



NOVEMBER 2014

Placemaking: Innovations In New Communities

Mahlon Apgar, IV



APPENDIX TO PLACEMAKING: INNOVATIONS IN NEW COMMUNITIES CONTENTS

This Appendix to *Placemaking: Innovations in New Communities* has five components:

1. *Innovations in New Communities Survey 2014 – US Version*, disseminated by the Counselors of Real Estate, National Town Builders Association, Royal Institution of Chartered Surveyors (RICS), and Urban Land Institute (ULI); the survey document was programmed in Conformat, a multi-channel survey research platform, by Rockbridge Associates, the survey administrators, and was accessed through a link on the organizations' websites.
2. *Innovations in New Communities Survey 2014 – UK Version*, disseminated online by the Royal Institution of Chartered Surveyors, Royal Town Planning Institute, Town and Country Planning Association, and Urban Land Institute; the survey document was programmed in Conformat, a multi-channel survey research platform, by Rockbridge Associates, the survey administrators, and was accessed through a link on the organizations' websites.
3. *Innovations in New Communities Survey 2014 – Analysis of the US and UK Versions*, prepared by Rockbridge Associates, the survey administrators.
4. *Innovations in New Communities Survey 2014 – Analysis of the US and UK Versions*, prepared independently by a New Communities Research Team from the Taubman College of Architecture and Urban Planning of the University of Michigan.
5. *Innovations in New Communities Interview Guide – US and UK Versions*; templates for interviews with approximately 20 new communities executives, professionals, scholars, and thought-leaders who are listed in the Guide.

RICS-ULI Innovation in New Communities Survey – 2014 (US Version)

INTRODUCTION

Thank you for participating in this survey on "Innovation: Lessons From -- and For -- New Communities". The survey's overall objectives are 1) to give policymakers and practitioners a timely, comparative view of American and British New Communities (NC); and 2) to produce guidelines for planning, developing and managing future NCs. This quantitative survey of active professionals will be complemented by qualitative interviews with NC executives and experts. From these data and insights, NCs will better accommodate demographic changes, capture new technologies, and adapt or revise policies to meet 21st century realities.

NCs are defined here as planned, long-term, mixed-use, residential settlements for populations from 1,000 to 100,000, located in urban or suburban areas of the US and UK. NCs are holistically designed, developed and managed by single, unified organizations. In the US, NCs are primarily private ventures known as "master-planned communities" such as Columbia, Maryland. In the UK, they are primarily public sector initiatives known as "garden cities" and "new towns" such as Milton Keynes. In both countries, NCs increasingly are public-private partnerships, with both government and business stakeholders, such as Fort Belvoir, Virginia, and King's Cross, London. The survey and interviews incorporate two major types of NCs for analysis and future planning: **"Greenfield"** and **"Urban Renaissance"**. See table of [Selected US and UK New Communities for representative projects in each category](#); and list of [Advisory and Working Group Members for participants in the survey's development and analysis](#).

NCs are intended by their sponsors to achieve a range of social and economic objectives, from increased housing and job choices to healthier living environments to stronger, more diversified local economies; and, recently, communities with mass transit connections that reduce car dependence and energy usage. NCs typically include a range of housing types and employment opportunities; community and recreational facilities; retail and commercial services; schools, healthcare and other public services; and productive as well as passive open spaces. NCs thus contrast with unplanned, ad hoc "sprawl" developments that prevail in many areas.

The focus on innovation differentiates this survey from other NC research. As used here, innovations are improvements to the built environment and/or the processes for planning, financing, developing and operating it. Innovations include the qualities, capabilities and tools that innovators apply in creating transformative changes and enabling new ways for people to live and work. Collectively, these are *management* innovations – exemplified by American Neighborhood and Community Homeowner Association models, Columbia's original multidisciplinary Work Group, overarching Economic Model, and Town Center's "rebirth"; and British "regeneration" and "urban extension" initiatives in cities and New Towns; Garden City "magnets" and "Betterment Value" policy; and organization of NC development corporations.

Sandy Apgar
May 2014

SCREENING QUESTIONS

The following questions are designed to ensure the survey will be relevant to you. Your responses will not be attributable to you.

- S1. How many years have you worked in real estate, housing, urban planning and related fields?
- a. 0 to 4 years
 - b. 5 to 9 years
 - c. 10 to 14 years
 - d. 15 to 19 years
 - e. 20 years or more
- S2. Have you been involved in mixed-use projects with 1,000 or more residents in the U.S.?
- 1 Yes
 - 2 No
- S3. [ASK IF S2=1] Which of the following best describes the highest position you held when you were involved with such projects?
- a. Owner, partner, principal; or senior public official
 - b. General manager with organization-wide responsibility
 - c. General manager with departmental or business unit responsibility
 - d. Senior real estate executive covering activities in more than one city
 - e. Real estate professional covering activities in only one city
 - f. Functional specialist (e.g., finance, marketing, planning) with organization-wide responsibility
 - g. Functional specialist with departmental or business unit responsibility
 - h. Other, please specify: _____
- S4. How interested are you personally in the New Communities concept for developing new "greenfield" sites and/or redeveloping-revitalizing existing urban areas?
- 5=Very interested
 - 4=Somewhat interested
 - 3=Neutral
 - 2=Not very interested
 - 1=Not at all interested

S5. Which of the following professional and industry organizations do you belong to? Select all that apply.

- a. American Planning Association
- b. American Real Estate Society
- c. British Property Federation
- d. Counselors of Real Estate
- e. National Town Builders Association
- f. Royal Institution of Chartered Surveyors
- g. Royal Town Planning Institute
- h. Town and Country Planning Association
- i. Urban Land Institute
- j. Other, please specify: _____

S6. Which of the following best describes your current position in your organization?

- a. Owner, partner, principal; or senior public official
- b. General manager with organization-wide responsibility
- c. General manager with departmental or business unit responsibility
- d. Senior real estate executive covering activities in more than one city
- e. Real estate professional covering activities in only one city
- f. Functional specialist (e.g., finance, marketing, planning) with organization-wide responsibility
- g. Functional specialist with departmental or business unit responsibility
- h. Other, please specify: _____

[THANK AND TERMINATE SCREEN DURING THE SURVEY: Thank you for your interest in this survey. Given your responses to our questions so far, the subject matter of the rest of the survey is not likely to be relevant or of interest to you. Thank you again for your time and willingness to help.]

MAIN QUESTIONNAIRE

The remainder of the survey has five parts: Definitions of and Metrics for New Communities; Attributes of Successful New Communities; Key Success and Failure Factors for New Communities; Statements about New Communities; and Organizational and Individual Information.

Definitions of, and Metrics for, New Communities

Please provide your opinions on the definitions of, and metrics for, new communities in the following questions. These are not confined to projects in which you have been personally involved.

From your knowledge and experience:

1. What is the *minimum population* that a NC must have to be successful? [Comparative Note: Columbia, MD = 100,000 residents; Reston, VA = 30,000 residents; Battery Park City, NY = 14,000 residents; Playa Vista (Los Angeles), CA = 6,000 residents]
 - a. Fewer than 1,000 residents
 - b. 1,001 to 4,999 residents
 - c. 5,000 to 9,999 residents
 - d. 10,000 to 24,999 residents
 - e. 25,000 to 49,999 residents
 - f. 50,000 residents or more
2. What is the *minimum land area* that a NC must have to be successful? [Comparative Note: Columbia, MD = 14,000 acres; Reston, VA = 7,400 acres; Playa Vista (Los Angeles), CA = 1,100 acres; Battery Park City, NY = 92 acres]
 - a. Fewer than 10 acres (<4 Ha)
 - b. 11 to 25 acres (4 to 11 Ha)
 - c. 26 to 50 acres (11 to 20 Ha)
 - d. 51 to 100 acres (21 to 40 Ha)
 - e. 101 to 499 acres (41 to 202 Ha)
 - f. 500 to 999 acres (203 to 404 Ha)
 - g. 1,000 to 2,499 acres (405 to 1,011 Ha)
 - h. 2,500 to 4,999 acres (1,012 to 2,023 Ha)
 - i. 5,000 to 9,999 acres (2,023 to 4,046 Ha)
 - j. 10,000 acres (4,047 Ha) or more

3.0 The average population density of US cities and suburbs is, respectively, 56 people per acre [3,580 people per square mile] and 0.5 people per acre [330 people per square mile].

Given your experience and these averages:

3.1. What is the *minimum population density* you would expect for a successful **"Greenfield"** NC? [Comparative Note: Columbia, MD = 6 persons per acre; Irvine, CA = 5 ppa; Woodlands, TX = 4 ppa]

- a. Fewer than 5 persons per acre (ppa)
- b. 5 to 9 ppa
- c. 10 to 14 ppa
- d. 15 to 19 ppa
- e. 20 ppa or more
- f. Density is not a significant factor

3.2. What is the *minimum population density* you would expect for a successful **"Urban Renaissance"** NC? [Comparative Note: Greenwich Village (New York City) = 123 persons per acre; Mission District (San Francisco, CA) = 45 ppa; Georgetown (Washington, DC) = 20 ppa]

- a. Fewer than 20 persons per acre (ppa)
- b. 20 to 29 ppa
- c. 30 to 39 ppa
- d. 40 to 49 ppa
- e. 50 ppa or more
- f. Density is not a significant factor

3.3. What *average population density* do you think a NC should have to be successful?

- a. Fewer than 10 persons per acre (ppa)
- b. 11 to 20 ppa
- c. 21 to 50 ppa
- d. 51 to 99 ppa
- e. 100 ppa or more
- f. Density is not a significant factor

4.0 **"Greenfield"** NCs generally range from 500 acres to 15,000 acres. **"Urban Renaissance"** NCs generally range from 10 acres to 1,000 acres. What acreage would you expect for successful "Greenfield" and "Urban Renaissance" NCs?

4.1. **For Greenfield NC**

- a. Fewer than 500 acres (<200 Ha)
- b. 500 to 999 acres (202 to 404 Ha)
- c. 1,000 to 2,499 acres (404 to 1,011 Ha)
- d. 2,500 to 4,999 acres (1,011 to 2,023 Ha)

- e. 5,000 to 9,999 acres (2,023 to 4,046 Ha)
- f. 10,000 to 14,999 acres (4,047 to 6,070 Ha)
- g. 15,000 acres (6,070 Ha) or more

4.2. For Urban Renaissance NC

- a. Fewer than 10 acres (<4 Ha)
- b. 11 to 25 acres (4 to 11 Ha)
- c. 26 to 50 acres (11 to 20 Ha)
- d. 51 to 99 acres (20 to 40 Ha)
- e. 100 to 299 acres (41 to 121 Ha)
- f. 300 to 499 acres (122 to 201 Ha)
- g. 500 to 999 acres (202 to 404 Ha)
- h. 1,000 acres (404 Ha) or more

5.0 What is the *maximum* travel time from each type of NC to the nearest major urban center that you think would attract residents and employees -- by automobile from Greenfield NCs and by mass transit from Urban Renaissance NCs?

5.1. From Greenfield NC to Urban Center by Automobile

- a. Less than 15 minutes
- b. 15-29 minutes
- c. 30-44 minutes
- d. 45-59 minutes
- e. 60-89 minutes
- f. 1.5 hours or more

5.2. From Urban Renaissance NC to Urban Center by Mass Transit

- a. Less than 5 minutes
- b. 5-9 minutes
- c. 10-14 minutes
- d. 15-29 minutes
- e. 30-44 minutes
- f. 45 minutes or more

6. Which are the five most important community facilities and/or services that should be incorporated in a Greenfield NC or an Urban Renaissance (UR) NC? This assumes that the community facilities/services in both types of NCs could be provided by a public, non-profit, or private organization.

Please use your mouse to move at least five items from the box on the left to the box on the right, and sort them in order from most important (top) to least important (bottom). Please use the arrows to re-order your choices if necessary. You may list up to ten in order of importance.

[RANDOMIZE]

- a. Schools (Pre-K, Kindergarten, Middle, High)
- b. Colleges / Universities
- c. Adult Learning, such as graduate-level continuing education
- d. Healthcare, such as outpatient clinics, doctor's and dentist's offices
- e. Neighborhood shops
- f. Recreation / Leisure activities, such as restaurants and movie theaters
- g. Religious facilities, such as churches and synagogues
- h. Security services / presence (including security cameras)
- i. Financial services, such as banks and ATMs
- j. Access to public transportation
- k. Walking and bicycle paths
- l. Open spaces / parks
- m. Other, please specify: _____

7. Which of the following objectives are most important in structuring a NC public-private partnership, starting with the most important?

Please use your mouse to move items from the box on the left to the box on the right, and sort them in order from most important (top) to least important (bottom). Please use the arrows to re-order your choices if necessary.

Only include items you consider important in the box on the right.

[RANDOMIZE]

- a. Attracting long-term financing
- b. Improving project management and service delivery
- c. Increasing availability of affordable housing
- d. Strengthening public oversight of the development process
- e. Increasing residents' participation in planning and operations
- f. Deepening political support for the NC
- g. Engaging local and national businesses in planning and operations
- h. Other, please specify: _____

Attributes of Successful New Communities

How important is each **income level** listed below to successful development of sale and rental housing in a New Community?

[1-5 FROM LEFT TO RIGHT USING IMPORTANCE SCALE]

Extremely important = 5

Very important = 4

Important = 3

Somewhat important = 2

Not at all important = 1

8.0 Housing-related **income levels**

- a. **Housing that attracts the top quintile (20%) of income groups** _____
- b. **Housing that attracts the second quintile (21 to 40%)** _____
- c. **Housing that attracts the third quintile (41 to 60%)** _____
- d. **Housing that attracts the fourth quintile (61 to 80%)** _____
- e. **Housing that attracts the bottom quintile (81 to 100%)** _____

8.1. What mix of **housing types** should be offered for multiple income levels in the NC?

Please allocate points so they sum to 100%. Your best estimate is fine.

- | | % |
|---|-------------|
| a. Single-family detached homes | _____ |
| b. Single-family attached townhouses | _____ |
| c. Multi-family low-rise apartments | _____ |
| d. Multi-family mid-rise apartments | _____ |
| e. Multi-family high-rise apartments | _____ |
| f. Other | _____ |
| Total: | 100% |

8.2. What mix of **housing tenures** should be offered to provide a range of housing choices in the NC?

Please allocate points so they sum to 100%. Your best estimate is fine.

[RANDOMIZE]

- | | % |
|--|-------------|
| a. Owner-occupied | _____ |
| b. Market rental | _____ |
| c. Income subsidy (e.g., vouchers) | _____ |
| d. Unit subsidy (e.g., tax rebates) | _____ |
| e. Other | _____ |
| Total: | 100% |

9. How important is each of the following in providing a **safe and secure environment** for residents, employees and visitors in a NC?

[RANDOMIZE]

- a. **Visible police / security presence on streets** _____
- b. **Conspicuous security devices (e.g., security cameras)** _____
- c. **Tight control of building access** _____
- d. **Uniformed community service workers** _____
- e. **Bright on-street lighting** _____
- f. **Other, please specify:** _____

10. How important is each of the following in **successful retail development and operations** for residents, employees and visitors in a NC?

[RANDOMIZE]

- a. **One or more “big box” or department stores** _____
- b. **Ample neighborhood supermarkets or convenience stores** _____
- c. **Variety of stores representing popular national brands** _____
- d. **Many "local" or specialized boutiques** _____
- e. **A selection of upscale restaurants** _____
- f. **A selection of moderately priced restaurants** _____
- g. **Other, please specify:** _____

11. How important is each of the following in providing **effective transportation facilities and services** in a NC?

[RANDOMIZE]

- a. **Easy highway access for commuters** _____
- b. **Ample free parking** _____
- c. **High-capacity mass transit (e.g., rail, light rail)** _____
- d. **Frequent rapid bus service (e.g., dedicated lanes)** _____
- e. **Reliable shuttle system for intra-project mobility** _____
- f. **Other modes for individual mobility (e.g., taxis)** _____
- g. **Separate truck loading / unloading docks, delivery lanes** _____
- h. **Other, please specify:** _____

12. How important is each of the following in providing a **mix of recreational, social and cultural amenities** throughout the NC?

[RANDOMIZE]

- a. **Venue for arts (or live stage) productions** _____
- b. **Commercial galleries** _____
- c. **Bars / lounges** _____
- d. **Community centers** _____
- e. **Movie theaters** _____
- f. **Libraries** _____
- g. **Distinctive urban architecture** _____
- h. **Other, please specify:** _____

13. How important is provision of each of the following types of **open and green space**, either within or easily accessible to the NC?

[RANDOMIZE]

- a. **Playing fields** _____
- b. **Parks and open space** _____
- c. **Urban farms and gardens** _____
- d. **Bikepaths** _____
- e. **Walking paths** _____
- f. **Woodlands** _____
- g. **Other, please specify:** _____

14. How important is provision of each of the following types of **educational opportunities**, either within or easily accessible to the NC?

- a. **High quality nursery schools** _____
- b. **High quality primary-secondary schools** _____
- c. **Two-year community / vocational-technical colleges** _____
- d. **Four-year public and private universities** _____
- e. **Major research universities** _____
- f. **Part-time advanced degree / professional programs** _____
- g. **Adult continuing education** _____
- h. **Other, please specify:** _____

15.0 How important is each of the following in fostering a **favorable business climate** to incubate new businesses and sustain all businesses in the NC?

[RANDOMIZE]

- a. Low business and personal taxes _____
- b. Grants and incentives _____
- c. Low land and building costs _____
- d. Readily available professional workforce _____
- e. Balanced mix of professional / technical employees _____
- f. Low wage environment _____
- g. High worker productivity _____
- h. Presence and "clustering" of innovative companies _____
- i. High degree of profitability in existing businesses _____
- j. "Business-friendly" local government _____
- k. Presence of firms in international business _____
- l. Other, please specify: _____

15.1. How important is each of the following **business real estate products**, either within or easily accessible to the NC?

[RANDOMIZE]

- a. Standard office space _____
- b. Shared office space _____
- c. Distribution / flex space _____
- d. Light manufacturing space _____
- e. Business incubation units _____
- f. "Live / Work" units _____
- g. Developable pre-serviced parcels _____
- h. Other, please specify: _____

Key Factors for the Success and Failure of New Communities

16.1. How important is each of the following **external success factors** in contributing to the success of NCs in general, or specific NCs in your organization?

[RANDOMIZE]

- a. Regional population growth _____
- b. Regional economic growth _____
- c. Diversified business / industry base _____
- d. Ease of access by automobile _____
- e. Ease of access by mass transit _____
- f. Supportive policies of local / state governments _____
- g. Multiple generations in local / regional marketplace _____
- h. Minority / ethnic groups in local / regional marketplace _____
- i. Attractive / desirable setting _____
- j. Adequate amount / quality of environmental resources _____

k. Other, please specify: _____

16.2. How important is each of the following **internal success factors** in contributing to the success of NCs in general, or specific NCs in your organization?

[RANDOMIZE]

- a. Visionary leadership _____
- b. Strong, experienced management _____
- c. Adequate / flexible initial financing _____
- d. Sustainable / stable long-term financing _____
- e. Assured delivery capability and timing _____
- f. Expert technical support _____
- g. Organizational experience / track record _____
- h. Robust computing / information / management systems _____
- i. Strong political relationships _____
- j. Community engagement / skillful "buy-in" _____
- k. Environmental sustainability program _____
- l. Other, please specify: _____

17.1 How important is each of the following **external failure factors** in contributing to the failure of NCs in general, and/or specific NCs in your organization?

[RANDOMIZE]

- a. Weak national or regional economy _____
- b. Diminished population growth / "Shrinking Cities" _____
- c. Strong competitors / competing projects _____
- d. Congested automobile access routes _____
- e. Poor mass transit facilities / services _____
- f. Lack of supportive government policies _____
- g. Area unattractive to specific generations (e.g., seniors) _____
- h. Area unattractive to specific minority / ethnic groups _____
- i. Weak public policy controls (e.g., carbon emissions) _____
- j. Excessive environmental risks (e.g., fire, contaminants) _____
- k. Other, please specify: _____

17.2. How important is each of the following **internal failure factors** in contributing to the failure of NCs in general, and/or specific NCs in your organization?

[RANDOMIZE]

- a. Inadequate leadership _____
- b. Weak management and delivery capabilities _____
- c. Inadequate / inflexible initial financing _____

- d. **Insufficient / episodic long-term financing** _____
- e. **Insufficient technical support** _____
- f. **Lack of organizational experience / track record** _____
- g. **Weak computing / information / management systems** _____
- h. **Other, please specify:** _____

18. Which innovations in New Community planning, development, and operations have significantly improved housing and urban policymaking, residential and community life, business and economic development, and/or real estate management practices?

The examples (e.g.) in each category below illustrate the types and ranges of "innovations" and "game changers" in New Communities to prompt your thinking, but they should not limit your entries.

Please enter as many innovations as you can in the expandable boxes below.

- a. **Structure** (e.g., public-private partnership, unified development corporation)
- b. **Economics** (e.g., land value model, sustainable energy rebates)
- c. **Planning and design** (e.g., holistic master-planning, "New Urbanism" design)
- d. **Financing** (e.g., 50-year ground lease, "waterfall" analytics)
- e. **Development** (e.g., phased infrastructure / lot sales, 1:1 housing / job mix)
- f. **Construction** (e.g., modular building)
- g. **Marketing** (e.g., homeowner sales office, minority agent policy)
- h. **Organization** (e.g., multi-disciplinary planning team, community services association)
- i. **Operations** (e.g., service performance metrics, sensor-driven delivery)
- j. **Other, please specify:** _____

Statements about New Communities

Please indicate your level of agreement with the following statements about New Communities:

[USE SLIDERS, 1-5 FROM LEFT TO RIGHT]

Strongly agree = 5

Somewhat agree = 4

Neutral = 3

Somewhat disagree = 2

Strongly disagree = 1

[RANDOMIZE ORDER OF Q19-Q38 ON PAGE]

19. Historical demographic, housing and business trends in Cities and Metro Areas provide good indicators of the potential for New Communities.

20. Market forces create the primary demand for mixed-use (i.e., residential-office-retail-hotel-entertainment etc.) New Communities.
21. New Communities will attract an increasing share of new households who seek lifestyle benefits they cannot find in traditional suburbs or urban centers.
22. Technology-based “company towns” (e.g. Facebook’s Anton Menlo) will emerge as a popular format for New Communities in the next decade.
23. Advances in technology (e.g. telecommuting) and work practices (e.g. independent contractors) will make New Communities more important in the next decade.
24. "Big Data" analytics will improve the capabilities of planners and developers to innovate in New Communities.
25. Growing use of "on-demand" personal transportation (e.g. Bikeshare, Zipcar, Uber) and / or mass transit modes (e.g., light rail, dedicated bus lanes) will have significant impact on the locations and layouts of New Communities.
26. Connections to regional and global economies will significantly influence New Communities locations in the next decade.
27. "Crowdsourcing" will provide an important new project planning and financing method for New Communities in the next decade.
28. New Communities can be successfully developed in Metro Areas that are centered on thriving Cities with sufficient public policy support for transportation and infrastructure.
29. New Communities can be financially structured to provide attractive risk-adjusted returns for long-term real estate investors.
30. New Communities in urban redevelopment areas offer opportunities for businesses to relocate from suburban areas into cities or to establish new locations within cities.
31. New Communities represent potential business opportunities for non-real estate businesses.
32. New Communities increase the likelihood of achieving a socially and economically diverse household mix.
33. New Communities should include affordable housing and/or mixed income residents.
34. New Community developers should commission innovative urban designs that help to enliven building architecture, open spaces, community services, and visitors' experiences.
35. New Communities should be "living laboratories" for cross-disciplinary management to discover and test improvements to the community development process.

36. New Communities should reflect enduring real estate business principles that increase economic values for public and private stakeholders.

37. New Communities should be incorporated into public policies and planning for the disposition and redevelopment of excess federal and state property.

38. New Communities should be planned and developed as integral parts of the US military's Base Realignment and Closure (BRAC) process.

Organizational and Individual Information

The following questions are for classification purposes only.

39. Please rank the five major business or professional activities of your organization by level of importance, starting from the most important.

Please use your mouse to move up to five items from the box on the left to the box on the right, and sort them in order from most important (top) to least important (bottom). Please use the arrows to re-order your choices if necessary.

[RANDOMIZE]

- a. Planning and design
- b. Land development
- c. Homebuilding
- d. Office development
- e. Retail development
- f. Equity investment
- g. Lending
- h. Marketing / brokerage
- i. Property management
- j. Professional services (e.g., accounting, consulting, law, valuation)
- k. Public Sector policymaking
- l. Public Sector administration
- m. Other (please specify) _____

40. Please select up to five Metro Areas in which your organization has focused its main business or professional activity.

Please note that the metro areas are listed alphabetically for easier review; the number in parentheses next to each metro area indicates its estimated population size according to the US Census, as of July 2012.

[LIST METRO AREAS IN ALPHABETICAL ORDER]

- a. Atlanta-Sandy Springs-Roswell, GA (5,457,831)
- b. Austin-Round Rock, TX (1,834,303)
- c. Baltimore-Columbia-Towson, MD (2,753,149)
- d. Birmingham-Hoover, AL (1,136,650)
- e. Boston-Cambridge-Newton, MA-NH (4,640,802)
- f. Buffalo-Cheektowaga-Niagara Falls, NY (1,134,210)
- g. Charlotte-Concord-Gastonia, NC-SC (2,296,569)
- h. Chicago-Naperville-Elgin, IL-IN-WI (9,522,434)
- i. Cincinnati, OH-KY-IN (2,128,603)
- j. Cleveland-Elyria, OH (2,063,535)
- k. Columbus, OH (1,944,002)
- l. Dallas-Fort Worth-Arlington, TX (6,700,991)
- m. Denver-Aurora-Lakewood, CO (2,645,209)
- n. Detroit-Warren-Dearborn, MI (4,292,060)
- o. Hartford-West Hartford-East Hartford, CT (1,214,400)
- p. Houston-The Woodlands-Sugar Land, TX (6,177,035)
- q. Indianapolis-Carmel-Anderson, IN (1,928,982)
- r. Jacksonville, FL (1,377,850)
- s. Kansas City, MO-KS (2,038,724)
- t. Las Vegas-Henderson-Paradise, NV (2,000,759)
- u. Los Angeles-Long Beach-Anaheim, CA (13,052,921)
- v. Louisville/Jefferson County, KY-IN (1,251,351)
- w. Memphis, TN-MS-AR (1,341,690)
- x. Miami-Fort Lauderdale-West Palm Beach, FL (5,762,717)
- y. Milwaukee-Waukesha-West Allis, WI (1,566,981)
- z. Minneapolis-St. Paul-Bloomington, MN-WI (3,422,264)
- aa. Nashville-Davidson--Murfreesboro--Franklin, TN (1,726,693)
- bb. New Orleans-Metairie, LA (1,227,096)
- cc. New York-Newark-Jersey City, NY-NJ-PA (19,831,858)
- dd. Oklahoma City, OK (1,296,565)
- ee. Orlando-Kissimmee-Sanford, FL (2,223,674)
- ff. Philadelphia-Camden-Wilmington, PA-NJ-DE-MD (6,018,800)
- gg. Phoenix-Mesa-Scottsdale, AZ (4,329,534)
- hh. Pittsburgh, PA (2,360,733)
- ii. Portland-Vancouver-Hillsboro, OR-WA (2,289,800)
- jj. Providence-Warwick, RI-MA (1,601,374)
- kk. Raleigh, NC (1,188,564)
- ll. Richmond, VA (1,231,980)
- mm. Riverside-San Bernardino-Ontario, CA (4,350,096)
- nn. Rochester, NY (1,082,284)

- oo. Sacramento--Roseville--Arden-Arcade, CA (2,196,482)
- pp. Salt Lake City, UT (1,123,712)
- qq. San Antonio-New Braunfels, TX (2,234,003)
- rr. San Diego-Carlsbad, CA (3,177,063)
- ss. San Francisco-Oakland-Hayward, CA (4,455,560)
- tt. San Jose-Sunnyvale-Santa Clara, CA (1,894,388)
- uu. Seattle-Tacoma-Bellevue, WA (3,552,157)
- vv. St. Louis, MO-IL (2,795,794)
- ww. Tampa-St. Petersburg-Clearwater, FL (2,842,878)
- xx. Virginia Beach-Norfolk-Newport News, VA-NC (1,699,925)
- yy. Washington-Arlington-Alexandria, DC-VA-MD-WV (5,860,342)

41. In which other countries besides the U.S., if any, does your organization currently conduct its main business or professional activity? *Please type up to 3 countries in the spaces below.*

42. In how many New Communities has your organization performed its principal business or professional activity.

- a. One NC
- b. 2 to 3 NCs
- c. 4 to 7 NCs
- d. 8 to 12 NCs
- e. More than 12 NCs
- f. None, my organization has not worked on New Communities

43. What proportion of your organization's total budget or "organizational effort" is allocated to Greenfield, Urban Renaissance, and other project types?

Please allocate points so they sum to 100%. Your best estimate is fine.

- a. Greenfield: _____%
- b. Urban Renaissance: _____%
- c. Other: _____%
- d. Total: 100%

44. [ASK IF Q42=A-E] What is the typical size of the New Communities in which your organization is involved? Please provide your best estimate.

- a. Fewer than 10 acres (<4 Ha)
- b. 11 to 25 acres (4 to 11 Ha)
- c. 26 to 50 acres (11 to 20 Ha)
- d. 51 to 100 acres (21 to 40 Ha)
- e. 101 to 499 acres (41 to 202 Ha)
- f. 500 to 999 acres (203 to 404 Ha)
- g. 1,000 to 2,499 acres (405 to 1,011 Ha)

- h. 2,500 to 4,999 acres (1,012 to 2,023 Ha)
- i. 5,000 to 9,999 acres (2,023 to 4,046 Ha)
- j. 10,000 acres (4,047 Ha) or more

If you would like to receive a summary report of the research findings prior to the results being publicly released, please provide your contact information below.

If you have any additional thoughts, or would like to be interviewed for the New Communities research project, please indicate this below.

This completes the survey. Thank you very much for participating. Your feedback is very important to us and your assistance is greatly appreciated.

.

RICS-ULI Innovation in New Communities Survey – 2014 (UK Version)

INTRODUCTION

Thank you for participating in this survey on "Innovation in New Communities". The survey's overall objectives are 1) to give policymakers and practitioners a timely, comparative view of British and American New Communities (NC); and 2) to produce guidelines for planning, developing and managing future NCs. This quantitative survey of active professionals will be complemented by qualitative interviews with NC executives and experts. From these data and insights, NCs will better accommodate demographic changes, capture new technologies, and adapt policies and management principles to meet 21st century realities.

NCs are defined here as planned, long-term, mixed-use residential settlements for populations from 1,000 to 100,000, located both in greenfield sites and in urban or suburban areas of the UK and US. NCs are holistically designed, developed and managed through a single, unified process and organisation. In the UK, NCs generally are public sector initiatives known as "garden cities" and "new towns" such as Milton Keynes. In the US, NCs are primarily private ventures known as "master-planned communities" such as Columbia, Maryland. In both countries, NCs increasingly are public-private partnerships, with both government and business stakeholders, such as Millennium Village, Greenwich, and King's Cross, London. The survey and interviews incorporate two major types of NCs for analysis and future planning: **"Greenfield"** and **"Urban Renaissance"**. See table of [Selected US and UK New Communities for representative projects in each category](#); and list of [Advisory and Working Group Members for participants in the survey's development and analysis](#).

NCs are intended by their sponsors to achieve a range of social and economic objectives, from increased housing and job choices to resilient, sustainable living environments to stronger, more diversified local economies; and, recently, communities with public transport connections that reduce car dependence and energy usage. NCs typically include a range of housing types and employment; community and recreational facilities; retail and commercial services; schools, healthcare and other public services; and active as well as passive open spaces. NCs thus contrast with unplanned, ad hoc "sprawl" developments that prevail in many areas.

The focus on innovation differentiates this survey from other NC research. As used here, innovations are improvements to the built environment and/or the processes for planning, financing, developing and operating it. Innovations include the qualities, capabilities and tools that innovators apply in creating transformative changes and enabling new ways for people to live and work. Collectively, these are *management* innovations – exemplified in Britain by "regeneration" and "urban extension" initiatives in cities and New Towns, the original Garden City "magnets," and NC development corporations; and in America by Community Homeowner Association models, Columbia's multidisciplinary Work Group and Economic Model, and Town Centre's current "rebirth".

*Sandy Apgar
May 2014*

SCREENING QUESTIONS

The following questions are designed to ensure the survey will be relevant to you. Your responses will not be attributable to you.

- S1. How many years have you worked in property, housing, urban planning and related fields?
- a. 0 to 4 years
 - b. 5 to 9 years
 - c. 10 to 14 years
 - d. 15 to 19 years
 - e. 20 years or more
- S2. Have you been involved in mixed-use projects with 1,000 or more residents?
- 1 Yes
 - 2 No
- S3. [ASK IF S2=1] Which of the following best describes the highest position you held when you were involved with such projects?
- a. Owner, partner, principal; or senior public official
 - b. General manager with organisation-wide responsibility
 - c. General manager with departmental or business unit responsibility
 - d. Senior property executive covering activities in more than one city
 - e. Property professional or planner covering activities in only one city
 - f. Functional specialist (e.g., finance, marketing, planning) with organisation-wide responsibility
 - g. Functional specialist with departmental or business unit responsibility
 - h. Other, please specify: _____
- S4. How interested are you personally in the New Communities concept and learning more about how to develop these communities successfully in the U.K.?
- 5=Very interested
 - 4=Somewhat interested
 - 3=Neutral
 - 2=Not very interested
 - 1=Not at all interested

S5. Which of the following professional and industry organisations do you belong to? Select all that apply.

- a. American Planning Association
- b. American Real Estate Society
- c. British Property Federation
- d. Counselors of Real Estate
- e. National Town Builders Association
- f. Royal Institution of Chartered Surveyors
- g. Royal Town Planning Institute
- h. Town and Country Planning Association
- i. Urban Land Institute
- j. Other, please specify: _____

S6. Which of the following best describes your current position in your organisation?

- a. Owner, partner, principal; or senior public official
- b. General manager with organisation-wide responsibility
- c. General manager with departmental or business unit responsibility
- d. Senior property executive covering activities in more than one city
- e. Property professional covering activities in only one city
- f. Functional specialist (e.g., finance, marketing, planning) with organisation-wide responsibility
- g. Functional specialist with departmental or business unit responsibility
- h. Other, please specify: _____

[THANK AND TERMINATE SCREEN DURING THE SURVEY: Thank you for your interest in this survey. Given your responses to our questions so far, the subject matter of the rest of the survey is not likely to be relevant or of interest to you. Thank you again for your time and willingness to help.]

MAIN QUESTIONNAIRE

The remainder of the survey has five parts: Definitions of and Metrics for New Communities; Attributes of Successful New Communities; Key Success and Failure Factors for New Communities; Statements about New Communities; and Organisational and Individual Information.

Definitions of, and Metrics for, New Communities

Please provide your opinions on the definitions of, and metrics for, new communities in the following questions. These are not confined to projects in which you have been personally involved.

From your knowledge and experience:

1. What is the *minimum population* that a NC must have to be successful? [Comparative Note: Milton Keynes = 250,000 residents; Welwyn Garden City = 85,000 residents, Cambourne (Cambridge) = 10,000 residents]
 - a. Fewer than 5,000 residents
 - b. 5,000 to 7,499 residents
 - c. 7,500 to 9,999 residents
 - d. 10,000 to 14,999 residents
 - e. 15,000 to 24,999 residents
 - f. 25,000 to 49,999 residents
 - g. 50,000 to 74,999 residents
 - h. 75,000 to 99,000 residents
 - i. 100,000 residents or more
 - j. Other: please specify _____
2. What is the *minimum land area* that a NC must have to be successful? [Comparative Note: Milton Keynes = 8,900 Hectares; Cambourne = 423 Ha; King's Cross = 27 Ha]
 - a. Fewer than 10 Hectares
 - b. 11 to 24 Hectares
 - c. 25 to 50 Hectares
 - d. 51 to 99 Hectares
 - e. 100 to 499 Hectares
 - f. 500 to 999 Hectares
 - g. 1,000 to 2,499 Hectares
 - h. 2,500 to 4,999 Hectares
 - i. 5,000 Hectares or more
 - j. Other: please specify _____

3.0 From your knowledge and experience:

3.1. What is the *minimum density* you would expect for a successful "**Greenfield**" NC?
[Comparative Note: Ebbsfleet (Kent) = 36 Dwelling Units per Hectare; Milton Keynes = 12 Dpha; King's Hill (Kent) = 9 Dpha]

- a. Fewer than 5 Dwelling Units per Hectare (Dpha)
- b. 5 to 9 Dpha
- c. 10 to 14 Dpha
- d. 15 to 19 Dpha
- e. 20 to 24 Dpha
- f. 25 to 29 Dpha
- g. 30 Dpha or more
- h. Other: please specify _____

3.2. What is the *minimum density* you would expect for a successful "**Urban Renaissance**" NC? [Comparative Note: Millennium Village (Greenwich) = 100 Dwelling Units per Hectare; Salford (Manchester) = 70 Dpha; Cambourne (Cambridge) = 32 Dpha]

- a. Fewer than 15 Dwelling Units per Hectare (Dpha)
- b. 15 to 24 Dpha
- c. 25 to 34 Dpha
- d. 35 to 49 Dpha
- e. 50 to 69 Dpha
- f. 70 to 89 Dpha
- g. 90 Dpha or more
- h. Other: please specify _____

3.3. What is the *average density* that you think a NC should have to be successful?

- a. Fewer than 10 Dwelling Units per Hectare (Dpha)
- b. 10 to 19 Dpha
- c. 20 to 34 Dpha
- d. 35 to 49 Dpha
- e. 50 to 69 Dpha
- f. 70 to 99 Dpha
- g. 100 Dpha or more
- h. Other: please specify _____

4.0 "**Greenfield**" NCs generally range from 300 Hectares to 10,000 Hectares. "**Urban Renaissance**" NCs generally range from 10 Hectares to 500 Hectares. From your knowledge and experience, what would be the 'ideal' land area for successful "Greenfield" and "Urban Renaissance" NCs?

4.1. For Greenfield NC

- a. Fewer than 200 Hectares
- b. 200 to 299 Hectares
- c. 300 to 499 Hectares
- d. 500 to 999 Hectares
- e. 1,000 to 2,499 Hectares
- f. 2,500 to 4,999 Hectares
- g. 5,000 to 7,499 Hectares
- h. 7,500 to 9,999 Hectares
- i. 10,000 Hectares or more

4.2. For Urban Renaissance NC

- a. Fewer than 10 Hectares
- b. 10 to 24 Hectares
- c. 25 to 49 Hectares
- d. 50 to 99 Hectares
- e. 100 to 299 Hectares
- f. 300 to 499 Hectares
- g. 500 to 749 Hectares
- h. 750 to 999 Hectares
- i. 1,000 Hectares or more

5.0 What is the *maximum* travel time from each type of NC to the nearest major city centre that you think would attract residents and employees -- by car from Greenfield NCs and by public transport from Urban Renaissance NCs?

5.1. From Greenfield NC to City Centre by Car

- a. Less than 15 minutes
- b. 15-29 minutes
- c. 30-44 minutes
- d. 45-59 minutes
- e. 60-89 minutes
- f. 1.5 hours or more

5.2. From Urban Renaissance NC to City Centre by Public Transport

- a. Less than 5 minutes
- b. 5-9 minutes
- c. 10-14 minutes
- d. 15-29 minutes
- e. 30-44 minutes
- f. 45 minutes or more

6. Which are the five most important community facilities and/or services that should be incorporated in a Greenfield NC or an Urban Renaissance (UR) NC? This assumes that the community facilities/services in both types of NCs could be provided by a public, non-profit, or private organisation.

Please use your mouse to move at least five items from the box on the left to the box on the right, and sort them in order from most important (top) to least important (bottom). Please use the arrows to re-order your choices if necessary. You may list up to ten in order of importance.

[RANDOMIZE]

- a. Nursery / Primary / Secondary Schools
- b. Further Education Colleges (e.g., graduate-level continuing education)
- c. Higher Education (e.g., universities)
- d. Healthcare (e.g., outpatient clinics, doctor's and dentist's offices)
- e. Neighbourhood shopping
- f. Recreation / Leisure activities (e.g., restaurants, cinemas)
- g. Religious facilities (e.g., churches, synagogues, mosques)
- h. Security services / presence (including CCTV)
- i. Financial services (e.g., banks, ATMs)
- j. Accessible public transport
- k. Walking and cycling
- l. Open spaces / parks
- m. Other _____

7. Which of the following objectives is most important in adopting a public-private partnership model for the NC, crafting its features, and structuring relationships among the partners, starting with the most important?

Please use your mouse to move items from the box on the left to the box on the right, and sort them in order from most important (top) to least important (bottom). Please use the arrows to re-order your choices if necessary.

Only include items you consider important in the box on the right.

[RANDOMIZE]

- a. Attracting long-term financing
- b. Improving project management and service delivery
- c. Increasing availability of affordable housing
- d. Strengthening public oversight of the development process
- e. Increasing residents' participation in planning and operations
- f. Deepening political support for the NC
- g. Engaging local and national businesses in planning and operations
- h. Other, please specify: _____

Attributes of Successful New Communities

How important is each **income level** listed below to successful development of owner-occupied and rental housing in a New Community?

[1-5 FROM LEFT TO RIGHT USING IMPORTANCE SCALE]

Extremely important = 5
Very important = 4
Important = 3
Somewhat important = 2
Not at all important = 1

8.0 Housing-related **income levels**

- a. Housing that attracts the top quintile (20%) of income groups _____
- b. Housing that attracts the second quintile (21 to 40%) _____
- c. Housing that attracts the third quintile (41 to 60%) _____
- d. Housing that attracts the fourth quintile (61 to 80%) _____
- e. Housing that attracts the bottom quintile (81 to 100%) _____

8.1. What mix of **housing types** should be offered to attract multiple income levels to the NC? Please allocate points so they sum to 100%. Please provide your best estimate.

	<u> </u> %
a. Detached houses	_____
b. Semi-detached or terraced townhouses	_____
c. Low-rise blocks of flats / apartments	_____
d. Mid-rise blocks of flats / apartments	_____
e. High-rise blocks of flats / apartments	_____
f. Other	=====
Total:	100%

8.2. What mix of **housing tenures** should be offered to attract residents to the NC and provide a range of housing choices? Please allocate points so they sum to 100%. Please provide your best estimate.

[RANDOMIZE]

a. Owner-occupied	_____
b. Market rental	_____
c. Social "affordable" units (e.g., rent pegged to % of income)	_____
d. Mixed-tenure (e.g., share ownership with social landlord)	_____
e. Other	=====
Total:	100%

9. How important is each of the following in providing a **safe, secure environment** for residents, employees and visitors in a NC?

[RANDOMIZE]

- a. **Low crime rates** _____
- b. **Visible police / security presence on streets** _____
- c. **Conspicuous security devices (e.g., security cameras)** _____
- d. **Tight control of building access** _____
- e. **Uniformed community service workers** _____
- f. **Bright on-street lighting** _____
- g. **Other, please specify:** _____

10. How important is each of the following in providing **attractive shopping opportunities** for residents, employees and visitors in a NC?

[RANDOMIZE]

- a. **One or more major department stores** _____
- b. **"Retail warehouses" (e.g., bulk items, DIY, garden centres)** _____
- c. **Ample neighbourhood markets or convenience stores** _____
- d. **Variety of stores representing popular national brands** _____
- e. **Many independent or specialised boutiques** _____
- f. **Selection of upscale restaurants** _____
- g. **Selection of moderately priced restaurants** _____
- h. **Distinctive commercial design / "sense of place"** _____
- i. **Other, please specify:** _____

11. How important is each of the following in providing **effective transportation facilities and services** in a NC?

[RANDOMIZE]

- a. **Easy "A" road or Motorway access for commuters** _____
- b. **Ample free parking** _____
- c. **High-capacity intercity transport (e.g., rail, light rail)** _____
- d. **Frequent rapid bus service (e.g., dedicated lanes)** _____
- e. **Reliable shuttle system for intra-project mobility** _____
- f. **Other modes for individual mobility (e.g., taxis)** _____
- g. **Separate truck loading / unloading docks, delivery lanes** _____
- h. **Other, please specify:** _____

12. How important is each of the following in providing **recreational, social and cultural amenities** throughout the NC?

[RANDOMIZE]

- a. Venue for theatre productions _____
- b. Community centres _____
- c. Leisure centre / pool / gym _____
- d. Commercial galleries _____
- e. Pubs / Bars _____
- f. Cinemas _____
- g. Libraries _____
- h. Other, please specify: _____

13. How important is provision of each of the following types of **open areas, green space and parkland**, either within or easily accessible to the NC?

[RANDOMIZE]

- a. Playing fields _____
- b. Parks and open space _____
- c. Urban farms and gardens _____
- d. Cyclepaths _____
- e. Walking paths _____
- f. Woodlands _____
- g. Other, please specify: _____

14. How important is provision of each of the following types of **educational opportunities**, either within or easily accessible to the NC?

- a. High quality nursery schools _____
- b. High quality primary-secondary schools _____
- c. Strong vocational-technical schools _____
- d. Easily accessible community colleges _____
- e. Part-time advanced degree / professional programmes _____
- f. Adult continuing education _____
- g. Public and private undergraduate universities _____
- h. Major research universities _____
- i. Other, please specify: _____

15.0 How important is each of the following in fostering a **favourable business climate** to incubate new businesses, and attract and sustain all businesses, in the NC?

[RANDOMIZE]

- a. **Low business rates and personal taxes** _____
- b. **Grants and incentives** _____
- c. **Low land and building costs** _____
- d. **Readily available professional workforce** _____
- e. **Balanced mix of professional / technical employees** _____
- f. **Low wage environment** _____
- g. **High worker productivity** _____
- h. **Presence and "clustering" of innovative companies** _____
- i. **High profitability of existing businesses** _____
- j. **"Business-friendly" local government** _____
- k. **Presence of firms in international business** _____
- l. **Other, please specify:** _____

15.1. How important is each of the following **business property types**, either within or easily accessible to the NC?

[RANDOMIZE]

- a. **Standard office space** _____
- b. **Shared office space** _____
- c. **Distribution / flex space** _____
- d. **Light manufacturing space** _____
- e. **Business incubation units** _____
- f. **"Live / Work" units** _____
- g. **Developable pre-serviced parcels** _____
- h. **Other, please specify:** _____

Key Factors for the Success and Failure of New Communities

16.1. How important is each of the following **external factors** to the success of NCs in general, or specific NCs in your organisation?

[RANDOMIZE]

- a. **Regional population growth** _____
- b. **Regional economic growth** _____
- c. **Diversified business / industry base** _____
- d. **Ease of access by car** _____
- e. **Ease of access by public transport (e.g., bus, rail, light rail)** _____
- f. **Supportive policies of local governments** _____

- g. Multiple generations in local / regional marketplace** _____
- h. Minority / ethnic groups in local / regional marketplace** _____
- i. Attractive / desirable setting** _____
- j. Adequate amount / quality of environmental resources** _____
- k. Other, please specify:** _____

16.2. How important is each of the following **internal factors** to the success of NCs in general, or specific NCs in your organisation?

[RANDOMIZE]

- a. Visionary / creative leadership** _____
- b. Experienced management / administrative support** _____
- c. Adequate / flexible initial development financing** _____
- d. Sustainable / stable long-term operations funding** _____
- e. Assured delivery capability and timing** _____
- f. Expert technical capabilities / support** _____
- g. Organisational experience / performance record** _____
- h. Strong computing / information / management systems** _____
- i. Relevant political relationships** _____
- j. Community engagement / skillful "buy-in"** _____
- k. Environmental sustainability programme** _____
- l. Distinctive urban plan / architecture / "sense of place"** _____
- m. Other, please specify:** _____

17.1 How important is each of the following **external factors** in impeding development of successful NCs, or contributing to their failure?

[RANDOMIZE]

- a. Weak national or regional economy** _____
- b. Diminished population growth / "Shrinking Cities"** _____
- c. Strong competitors / competing projects** _____
- d. Congested automobile access routes** _____
- e. Poor public transport infrastructure / facilities / services** _____
- f. Lack of supportive government policies** _____
- g. Area unattractive to specific generations (e.g., seniors)** _____
- h. Area unattractive to specific minority / ethnic groups** _____
- i. Weak public policy controls (e.g., carbon emissions)** _____
- j. Excessive environmental risks (e.g., fire, contaminants)** _____
- k. Other, please specify:** _____

17.2. How important is each of the following **internal factors** in impeding development of successful NCs or contributing to their failure?

[RANDOMIZE]

- a. **Uninspiring leadership** _____
- b. **Inexperienced management / weak delivery capabilities** _____
- c. **Inadequate / inflexible initial financing** _____
- d. **Insufficient / episodic long-term financing** _____
- e. **Uncertain delivery / timing** _____
- f. **Insufficient technical expertise / support** _____
- g. **Lack of organisational experience / performance record** _____
- h. **Weak computing / information / management systems** _____
- i. **Poor / misdirected political relationships** _____
- j. **Inadequate community engagement / "buy-in"** _____
- k. **Shallow environmental sustainability programme** _____
- l. **Routine, "boring" design** _____
- m. **Other, please specify:** _____

18. Which innovations in New Community planning and development have significantly improved housing and urban policymaking, residential and community life, business and economic development, and/or property management practices?

The examples (e.g.) in each category below illustrate the types and ranges of "innovations" and "game changers" in New Communities to prompt your thinking, but they should not limit your entries.

Please enter as many innovations as you can in the expandable boxes below.

- a. **Vision** (e.g., long-term community plans, multiple socio-economic objectives)
- b. **Structure** (e.g., unified development corporation, public-private partnership)
- c. **Economics** (e.g., land value model, sustainable energy rebates)
- d. **Planning and design** (e.g., holistic master-planning, "New Urbanism" design)
- e. **Financing** (e.g., 50-year ground lease, "waterfall" analytics)
- f. **Development** (e.g., phased infrastructure / lot sales, 1:1 housing / job mix)
- g. **Land** (e.g., phased draw down)
- h. **Construction** (e.g., modular building, recycled materials supply chain)
- i. **Marketing** (e.g., homeowner sales office, ethnic agent specialists)
- j. **Organisation** (e.g., multi-disciplinary team, community services association)
- k. **Operations** (e.g., service performance metrics, sensor-based delivery system)
- l. **Other, please specify:** _____

Statements about New Communities

Please indicate your level of agreement with the following statements about New Communities:

[USE SLIDERS, 1-5 FROM LEFT TO RIGHT]

Strongly agree = 5
Somewhat agree = 4
Neutral = 3
Somewhat disagree = 2
Strongly disagree = 1

[RANDOMIZE ORDER OF Q19-Q38 ON PAGE]

19. Historical demographic, housing and business trends in Cities and Urban Areas provide good indicators of the potential for New Communities.

20. Market forces create primary demand for mixed-use (i.e., residential-office-retail-hotel-entertainment etc.) New Communities.

21. New Communities will attract an increasing share of new households in Urban Areas who seek lifestyle benefits they cannot find in traditional suburbs or commercial centres.

22. Technology-based “company towns” (e.g. Facebook’s Anton Menlo California mixed-use residential development) will emerge as a popular format for New Communities in the next decade.

23. Advances in technology (e.g. telecommuting) and work practices (e.g. independent contractors) will make New Communities more important in the next decade.

24. "Big Data" analytics will improve the capabilities of planners and developers to innovate in New Communities.

25. Growing use of "on-demand" personal transportation (e.g. Bikeshare, Hailo, Zipcar) and / or public transport (e.g., light rail, dedicated bus lanes) will have significant impact on the locations and layouts of New Communities.

26. Connections to regional and global economies, enabled by innovations in telecommuting and transportation, will significantly influence New Communities locations in the next decade.

27. "Crowdsourcing" will provide an important new project planning and financing method for New Communities in the next decade.

28. New Communities can be successfully developed in Urban Areas that are centered on thriving Cities with sufficient public policy support for transportation and infrastructure.

29. New Communities can be financially structured to provide attractive risk-adjusted returns for long-term property investors.

30. New Communities in "urban regeneration" areas offer opportunities for businesses to relocate from suburban areas into cities or to establish new locations within cities.
31. New Communities represent potential business opportunities for non-property businesses.
32. New Communities increase the likelihood of achieving a socially and economically diverse household mix.
33. New Communities should include affordable housing and/or mixed income residents.
34. New Community developers should commission innovative urban designs that help to enliven building architecture, open spaces, and community programmes.
35. New Communities should be "working laboratories" for interdisciplinary planning and management to discover and test innovations in sustainable financing, construction, development and operations.
36. New Communities should reflect enduring business real estate principles that increase economic values for public and private stakeholders.
37. New Communities planning should be integrated with disposition, redevelopment and redeployment of excess government property.
38. New Communities should be integrated with government programmes and regional policies for military base rationalization, with specific attention to use of public-private partnerships for base redevelopment and operations.

Organisational and Individual Information

The following questions are for classification purposes only.

39. Please rank the five major business or professional activities of your organisation by level of importance, starting from the most important.

Please use your mouse to move up to five items from the box on the left to the box on the right, and sort them in order from most important (top) to least important (bottom). Please use the arrows to re-order your choices if necessary.

[RANDOMIZE]

- a. Planning
- b. Design
- c. Land development
- d. Housebuilding
- e. Office development
- f. Retail development

- g. Equity investment
- h. Lending
- i. Marketing / brokerage
- j. Property management
- k. Professional services (e.g., accountancy, consulting, law, valuation)
- l. Public Sector policymaking
- m. Public Sector administration
- n. Other (please specify) _____

40. Please select up to five Urban Areas in which your organisation has focused its main business or professional activity, by level of importance to your organisation, starting from the most important.

Please note that the Urban Areas are listed by size in descending order for easier review.

- a. Greater London Built Up Area (BUA)
- b. Greater Manchester BUA
- c. West Midlands BUA
- d. West Yorkshire BUA
- e. Liverpool BUA
- f. South Hampshire BUA
- g. Tyneside BUA
- h. Nottingham BUA
- i. Sheffield
- j. Bristol
- k. Leicester
- l. Brighton and Hove
- m. Bournemouth
- n. Cardiff
- o. Teeside
- p. Stoke
- q. Coventry
- r. Sunderland
- s. Birkenhead
- t. Reading
- u. Kingston upon Hull
- v. Preston
- w. Newport
- x. Swansea
- y. Southend on Sea

41. In which other countries besides the U.K., if any, does your organisation currently conduct its main business or professional activity? *Please type up to 3 countries in the spaces below.*

42. In how many New Communities has your organisation performed its principal business or professional activity?

- a. One NC
- b. 2 to 3 NCs
- c. 4 to 7 NCs
- d. 8 to 12 NCs
- e. More than 12 NCs
- f. None, my organisation has not worked on New Communities

43. What proportion of your organisation's total budget or "organisational effort" is allocated to Greenfield, Urban Renaissance, and other NC project types?

Please allocate points so they sum to 100%. Your best estimate is fine.

- | | |
|-----------------------|---------|
| a. Greenfield: | _____ % |
| b. Urban Renaissance: | _____ % |
| c. Other: | _____ % |
| d. Total: | 100% |

44. [ASK IF Q42=A-E] What is the typical size of the New Communities in which your organisation is involved?

Please provide your best estimate.

- a. Fewer than 10 Hectares
- b. 11 to 24 Hectares
- c. 25 to 50 Hectares
- d. 51 to 99 Hectares
- e. 100 to 499 Hectares
- f. 500 to 999 Hectares
- g. 1,000 to 2,499 Hectares
- h. 2,500 to 4,999 Hectares
- i. 5,000 Hectares or more
- j. Other: please specify _____

If you would like to receive a summary report of the research findings prior to the results being publicly released, please provide your contact information below.

If you have any additional thoughts, or would like to be interviewed for the New Communities research project, please indicate this below.

This completes the survey. Thank you very much for participating. Your feedback is very important to us and your assistance is greatly appreciated.



Innovations In New Communities Survey 2014

Analysis For Mahlon Apgar, IV



Prepared by Rockbridge Associates, Inc.

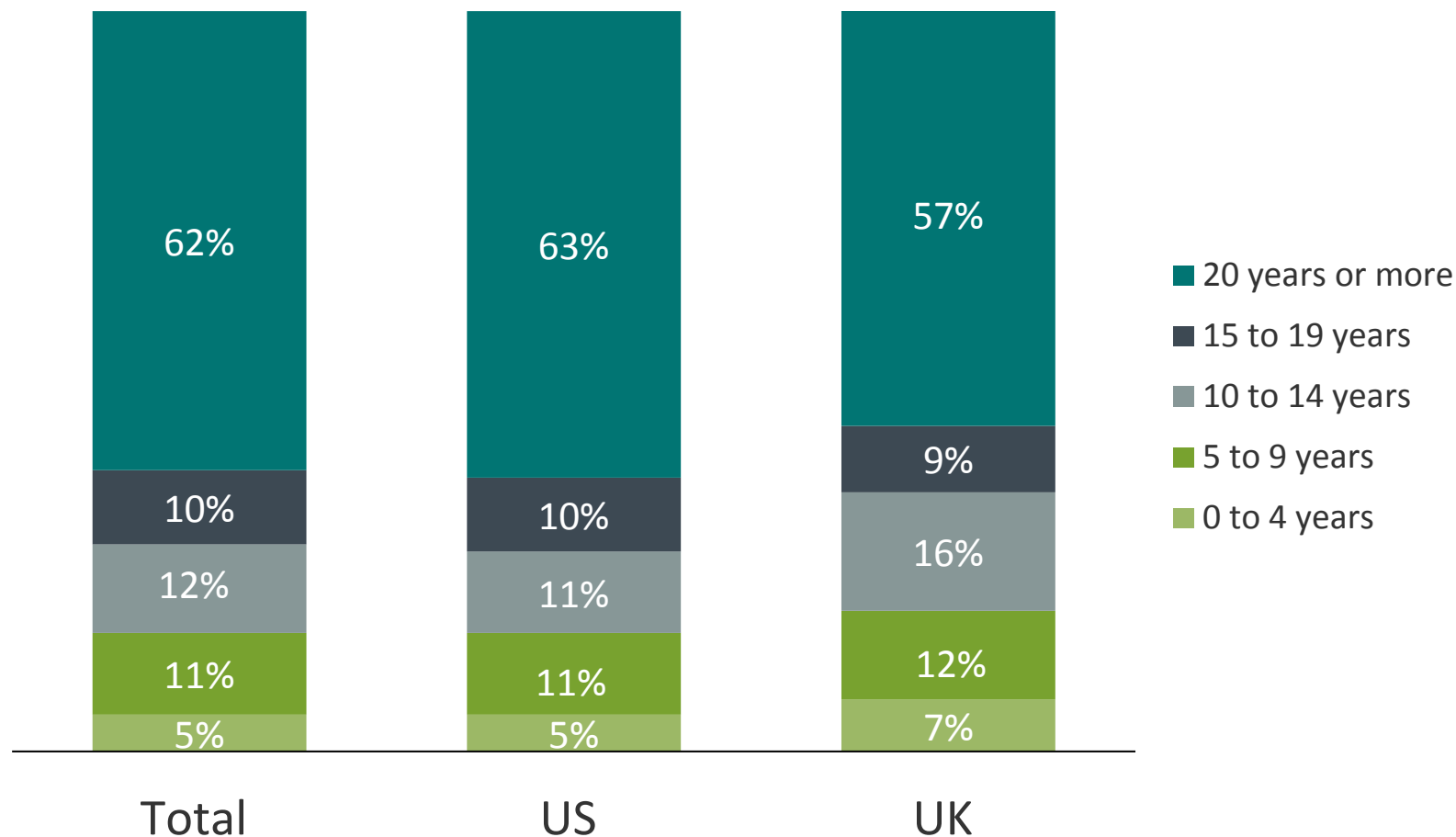


Survey Methodology

- Industry professionals with an interest in the concept of New Communities – including members and affiliates of ULI, NTBA, RTPI, RICS, CRE, and Colliers – were invited to complete a web-based survey by email or via a link on an organization's website.
- A total of 727 respondents (margin of error* = $\pm 3.4\%$) completed the survey. Of these:
 - 614 respondents (margin of error = $\pm 3.7\%$) completed the US version
 - 113 respondents (margin of error = $\pm 8.7\%$) completed the UK version
- The majority of respondents (661 of the 727) were ULI members/affiliates.
- The survey was fielded between June 9th and September 8th, 2014.
- The median time taken to complete the survey was just over 30 minutes.
- In appreciation of their participation, respondents who completed the survey were promised a summary report of the findings before the results are publicly released.
- Findings from the survey will be complemented by about 30 in-depth interviews with developers and experts in both the US and UK.
- An uppercase "H" next to a number indicates that the given value is statistically significantly higher than its counterpart value (US or UK) at the 95% level.

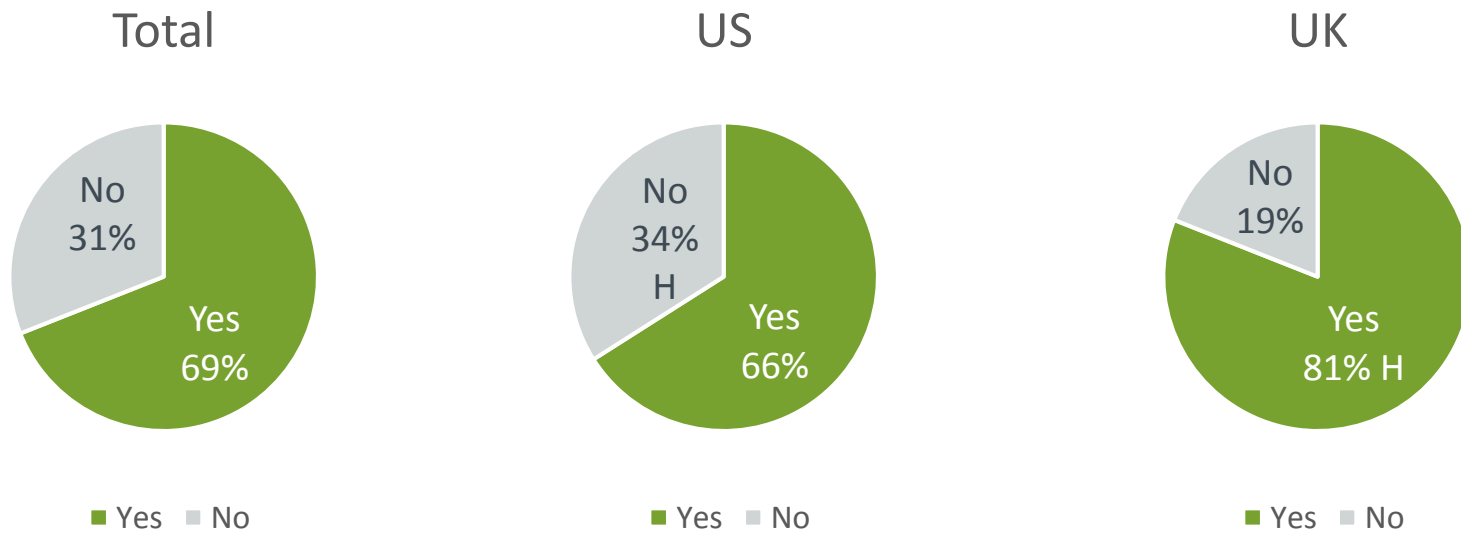
**Please note: All surveys have a "margin of error" that results from relying on a sample rather than a complete census.*

Years Worked in Real Estate, Urban Planning and Related Fields



S1. How many years have you worked in real estate, housing, urban planning and related fields?

Involvement in Mixed-Use Projects with 1,000 or More Residents



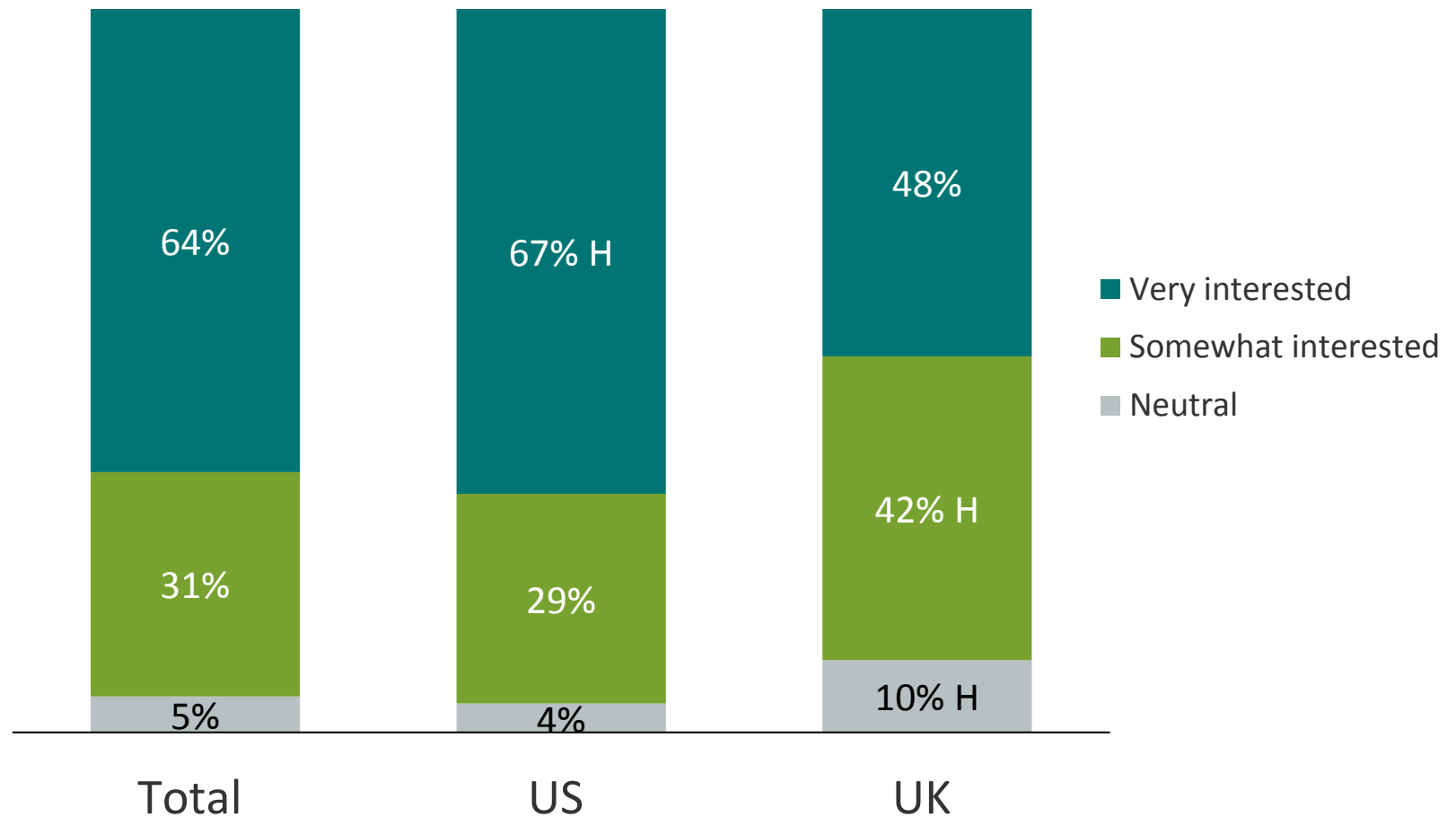
S2. Have you been involved in mixed-use projects with 1,000 or more residents?



Highest Position Held When Involved	Total	US	UK
Owner, partner, principal; or senior public official	27%	28%	24%
General manager with organization-wide responsibility	5%	5%	4%
General manager with departmental or business unit responsibility	5%	4%	9%
Senior real estate/property executive covering activities in more than one city	11%	12% H	5%
Real estate/property professional covering activities in only one city	7%	5%	16% H
Functional specialist (e.g., finance, marketing, planning) with organization-wide responsibility	15%	16%	13%
Functional specialist with departmental or business unit responsibility	8%	8%	9%
Other	22%	23%	19%

S3. Which of the following best describes the highest position you held when you were involved with such projects?

Personal Interest in the New Communities Concept



S4. How interested are you personally in the New Communities concept for developing new “greenfield” sites and/or redeveloping-revitalizing existing urban areas? (Please note: those who expressed disinterest were screened out – hence why those numbers are not shown).



Belonging to Professional and Industry Organizations	US	UK
American Planning Association	29%	7%
American Real Estate Society	3%	0%
British Property Federation	0%	3%
Counselors of Real Estate	4%	0%
National Town Builders Association	1%	0%
Royal Institution of Chartered Surveyors	2%	23%
Royal Town Planning Institute	<1%	22%
Town and Country Planning Association	<1%	4%
Urban Land Institute	95%	56%
Other	40%	36%

S5. Which of the following professional and industry organizations do you belong to?



Current Position in Organization	Total	US	UK
Owner, partner, principal; or senior public official	42%	43% H	33%
General manager with organization-wide responsibility	6%	5%	9%
General manager with departmental or business unit responsibility	7%	7%	8%
Senior real estate/property executive covering activities in more than one city	8%	8%	7%
Real estate/property professional covering activities in only one city	5%	5%	5%
Functional specialist (e.g., finance, marketing, planning) with organization-wide responsibility	10%	9%	14%
Functional specialist with departmental or business unit responsibility	10%	10%	10%
Other	12%	12%	14%

S6. Which of the following best describes your current position in your organization?



Minimum Population for a Successful New Community	US	Minimum Population for a Successful New Community	UK
Fewer than 1,000 residents	12%	Fewer than 5,000 residents	16%
1,001 to 4,999 residents	35%	5,000 to 7,499 residents	9%
5,000 to 9,999 residents	27%	7,500 to 9,999 residents	12%
10,000 to 24,999 residents	17%	10,000 to 14,999 residents	22%
25,000 to 49,999 residents	6%	15,000 to 24,999 residents	12%
50,000 residents or more	3%	25,000 to 49,999 residents	14%
		50,000 to 74,999 residents	6%
		75,000 to 99,000 residents	2%
		100,000 residents or more	6%

Q1. What is the minimum population that a NC must have to be successful?



Minimum Land Area for a Successful New Community	US	Minimum Land Area for a Successful New Community	UK
Fewer than 10 acres (<4 Ha)	7%	Fewer than 10 Hectares	12%
11 to 25 acres (4 to 11 Ha)	11%	11 to 24 Hectares	5%
26 to 50 acres (11 to 20 Ha)	10%	25 to 50 Hectares	14%
51 to 100 acres (21 to 40 Ha)	19%	51 to 99 Hectares	11%
101 to 499 acres (41 to 202 Ha)	21%	100 to 499 Hectares	31%
500 to 999 acres (203 to 404 Ha)	13%	500 to 999 Hectares	11%
1,000 to 2,499 acres (405 to 1,011 Ha)	11%	1,000 to 2,499 Hectares	6%
2,500 to 4,999 acres (1,012 to 2,023 Ha)	4%	2,500 to 4,999 Hectares	5%
5,000 to 9,999 acres (2,023 to 4,046 Ha)	2%	5,000 Hectares or more	3%
10,000 acres (4,047 Ha) or more	1%		

Q2. What is the *minimum land area* that a NC must have to be successful?



Minimum population density for a successful "Greenfield" NC (Persons per Acre)	US	Minimum density for a successful "Greenfield" NC (Dwellings per Hectare)	UK
Fewer than 5 ppa	8%	Fewer than 5 Dpha	1%
5 to 9 ppa	41%	5 to 9 Dpha	4%
10 to 14 ppa	22%	10 to 14 Dpha	19%
15 to 19 ppa	10%	15 to 19 Dpha	18%
20 ppa or more	14%	20 to 24 Dpha	18%
Density is not a significant factor	6%	25 to 29 Dpha	14%
		30 Dpha or more	21%

Q3.1. What is the *minimum population density* you would expect for a successful "**Greenfield**" NC?



Minimum population density for a successful "Urban Renaissance" NC (Persons per Acre)	US	Minimum density for a successful "Urban Renaissance" NC (Dwellings per Hectare)	UK
Fewer than 20 ppa	9%	Fewer than 15 Dpha	2%
20 to 29 ppa	29%	15 to 24 Dpha	7%
30 to 39 ppa	20%	25 to 34 Dpha	11%
40 to 49 ppa	19%	35 to 49 Dpha	21%
50 ppa or more	20%	50 to 69 Dpha	28%
Density is not a significant factor	4%	70 to 89 Dpha	12%
		90 Dpha or more	15%

Q3.2. What is the *minimum population density* you would expect for a successful "Urban Renaissance" NC?



Average population density for a successful NC (Persons per Acre)	US	Average density for a successful NC (Dwellings per Hectare)	UK
Fewer than 10 ppa	6%	Fewer than 10 Dpha	1%
11 to 20 ppa	26%	10 to 19 Dpha	6%
21 to 50 ppa	44%	20 to 34 Dpha	29%
51 to 99 ppa	15%	35 to 49 Dpha	21%
100 ppa or more	2%	50 to 69 Dpha	25%
Density is not a significant factor	7%	70 to 99 Dpha	3%
		100 Dpha or more	12%

Q3.3. What *average population density* do you think a NC should have to be successful?



Expected Acreage for Successful Greenfield NCs	US	Ideal Land Area for Successful Greenfield NCs	UK
Fewer than 500 acres (<200 Ha)	21%	Fewer than 200 Hectares	12%
500 to 999 acres (202 to 404 Ha)	32%	200 to 299 Hectares	11%
1,000 to 2,499 acres (404 to 1,011 Ha)	26%	300 to 499 Hectares	13%
2,500 to 4,999 acres (1,011 to 2,023 Ha)	12%	500 to 999 Hectares	26%
5,000 to 9,999 acres (2,023 to 4,046 Ha)	6%	1,000 to 2,499 Hectares	25%
10,000 to 14,999 acres (4,047 to 6,070 Ha)	2%	2,500 to 4,999 Hectares	9%
15,000 acres (6,070 Ha) or more	<1%	5,000 to 7,499 Hectares	3%
		7,500 to 9,999 Hectares	0%
		10,000 Hectares or more	1%

Q4.1. What acreage/ideal land area would you expect for successful “Greenfield” NCs?



Expected Acreage for Successful Urban Renaissance NCs	US	Ideal Land Area for Successful Urban Renaissance NCs	UK
Fewer than 10 acres (<4 Ha)	15%	Fewer than 10 Hectares	12%
11 to 25 acres (4 to 11 Ha)	26%	10 to 24 Hectares	10%
26 to 50 acres (11 to 20 Ha)	21%	25 to 49 Hectares	21%
51 to 99 acres (20 to 40 Ha)	18%	50 to 99 Hectares	16%
100 to 299 acres (41 to 121 Ha)	12%	100 to 299 Hectares	28%
300 to 499 acres (122 to 201 Ha)	4%	300 to 499 Hectares	8%
500 to 999 acres (202 to 404 Ha)	3%	500 to 749 Hectares	2%
1,000 acres (404 Ha) or more	2%	750 to 999 Hectares	1%
		1,000 Hectares or more	3%

Q4.2. What acreage/ideal land area would you expect for successful “Urban Renaissance” NCs?



Maximum Travel Time from Greenfield NC to Urban Center by Car	Total	US	UK	Maximum Travel Time from Urban Renaissance NC to Urban Center by Mass Transit	Total	US	UK
Less than 15 minutes	9%	10% H	4%	Less than 5 minutes	4%	4%	3%
15-29 minutes	39%	41% H	29%	5-9 minutes	15%	16%	10%
30-44 minutes	32%	30%	45% H	10-14 minutes	34%	35%	28%
45-59 minutes	16%	15%	20%	15-29 minutes	34%	32%	43% H
60-89 minutes	2%	2%	2%	30-44 minutes	12%	11%	16%
1.5 hours or more	1%	1%	0%	45 minutes or more	1%	1%	1%

Q5.1./Q5.2. What is the *maximum* travel time from each type of NC to the nearest major urban center that you think would attract residents and employees -- by automobile from Greenfield NCs and by mass transit from Urban Renaissance NCs?



Most Important Community Facilities and/or Services to be included in a Greenfield or an Urban Renaissance NC (% ranked in the top five)	Total	US	UK
Neighborhood shops	78%	77%	83%
Open spaces / parks	77%	79% H	65%
Access to public transportation	76%	74%	89% H
Recreation / Leisure activities, such as restaurants and movie theaters	66%	69% H	54%
Schools (Pre-K, Kindergarten, Middle, High)	66%	63%	81% H
Walking and bicycle paths	60%	64% H	39%
Healthcare, such as outpatient clinics, doctor's and dentist's offices	32%	29%	47% H
Financial services, such as banks and ATMs	14%	14%	13%
Security services / presence (including security cameras)	10%	10%	11%
Colleges / Universities	7%	8%	6%
Religious facilities, such as churches and synagogues	6%	6%	6%
Adult Learning, such as graduate-level continuing education	2%	2%	6%
Other, please specify:	5%	6% H	2%

Q6. Which are the five most important community facilities and/or services that should be incorporated in a Greenfield NC or an Urban Renaissance (UR) NC?



Most Important Objectives in Structuring a NC Public-Private Partnership (% ranked in the top two)	Total	US	UK
Attracting long-term financing	53%	54% H	43%
Deepening political support for the NC	42%	43%	34%
Engaging local and national businesses in planning and operations	25%	25%	21%
Increasing residents' participation in planning and operations	23%	23%	25%
Increasing availability of affordable housing	21%	20%	23%
Improving project management and service delivery	19%	19%	21%
Strengthening public oversight of the development process	11%	9%	24% H
Other, please specify:	5%	5%	7%

Q7. Which of the following objectives are most important in structuring a NC public-private partnership, starting with the most important?

Income Levels Important to the Successful Development of Sale and Rental Housing in NCs	Total	US	UK
Top quintile	39%	41% H	28%
Second quintile	70%	71% H	60%
Third quintile	56%	57%	53%
Fourth quintile	32%	30%	43% H
Bottom quintile	18%	17%	27% H

Q8.1. How important is each income level listed below to successful development of sale and rental housing in a New Community?



Mix of Housing Types that Should be Offered in the NC (Means, %)	Total	US	UK
Detached homes	26.46	27.51 H	20.42
Semi-detached/attached homes	23.71	23.18	26.62 H
Low-rise apartments	19.55	19.08	22.08 H
Mid-rise apartments	21.24	21.30	20.87
High-rise apartments	14.34	14.11	15.53
Other	6.32	5.93	7.96

Q8.2. What mix of housing types should be offered for multiple incomes levels in the NC?



Mix of Housing Tenures that Should Be Offered in the NC (Means, %)	Total	US	UK
Owner-occupied	48.13	48.79 H	44.48
Market rental	32.62	33.94 H	25.20
Income subsidy/affordable units	10.56	9.58	15.46 H
Unit	12.14	11.04	17.88 H
Other	6.30	5.85	8.32

Q8.3. What mix of housing tenures should be offered to provide a range of housing choices in the NC?

© Mahlon Apgar, IV, 2014. All rights reserved.



Most Important Features in Providing a Safe and Secure Environment (% Ranked Very/Extremely Important)	Total	US	UK
Visible police / security presence on streets	40%	43% H	25%
Conspicuous security devices	24%	24%	21%
Tight control of building access	37%	37%	37%
Uniformed community service workers	22%	22%	24%
Bright on-street lighting	59%	61% H	49%
Low crime rates	N/A	N/A	81%

Q9. How important is each of the following in providing a safe and secure environment for residents, employees and visitors to a NC?



Importance of the Following in Successful Retail Development and Operations in a NC (% Ranked Very/Extremely Important)	Total	US	UK
One or more "big box" department stores	11%	9%	21% H
Ample neighborhood supermarkets or convenience stores	81%	83% H	66%
Variety of stores representing popular national brands	24%	23%	25%
Many "local" or specialized boutiques	46%	50% H	27%
A selection of upscale restaurants	30%	32% H	20%
A selection of moderately priced restaurants	65%	69% H	48%
Distinctive commercial design/"sense of place"	N/A	N/A	77%
Retail warehouses	N/A	N/A	10%

Q10. How important is each of the following in successful retail development and operations for residents, employees, and visitors in a NC?



Most Important Features in Providing Effective Transportation Facilities and Services (% Ranked Very/Extremely Important)	Total	US	UK
High-capacity mass transit (e.g., rail, light rail)	59%	58%	64%
Frequent rapid bus service (e.g., dedicated lanes)	49%	45%	68% H
Easy highway access for commuters	46%	47%	43%
Ample free parking	35%	34%	37%
Other modes for individual mobility (e.g., taxis)	35%	34%	35%
Reliable shuttle system for intra-project mobility	33%	33%	37%
Separate truck loading / unloading docks, delivery lanes	28%	28%	23%

Q11. How important is each of the following in providing effective transportation facilities and services in a NC?

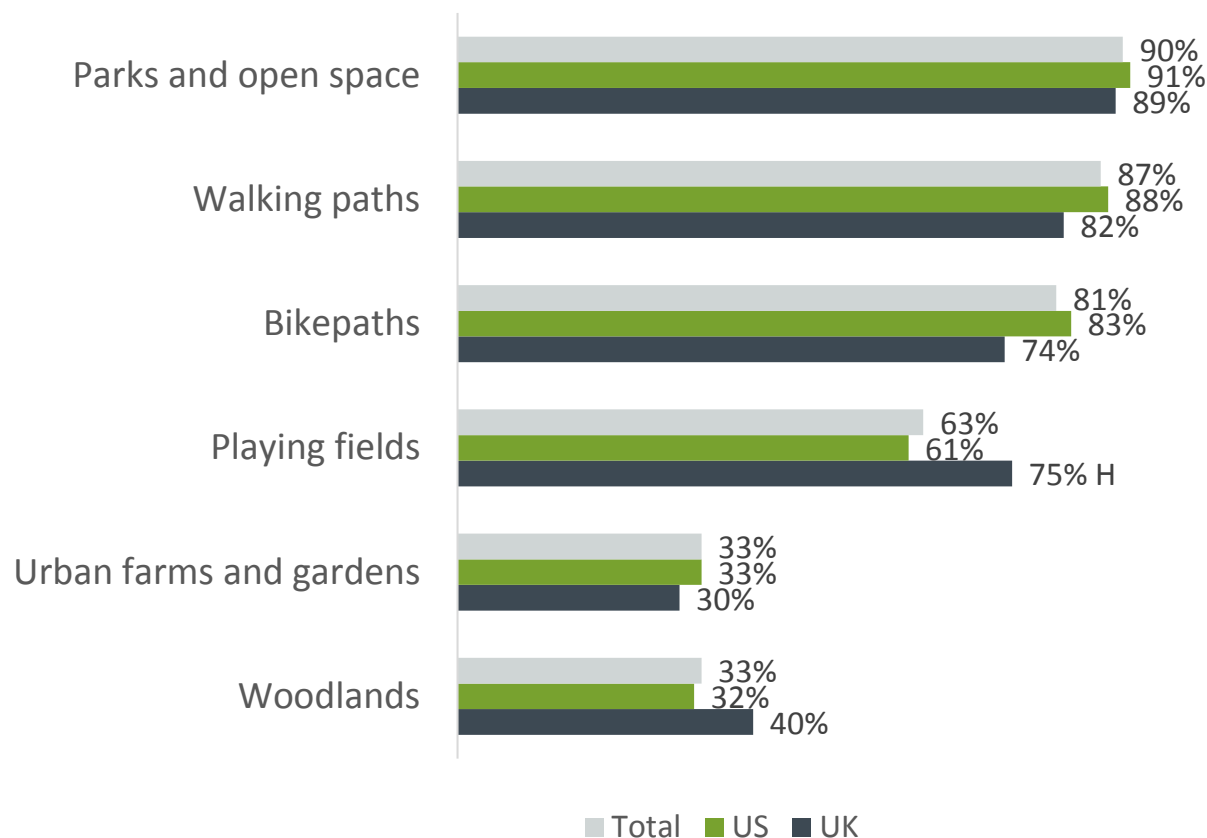
Most Important Features in Providing a Mix of Recreational, Social and Cultural Amenities (% Ranked Very/Extremely Important)	Total	US	UK
Venue for arts (or live stage) productions	44%	49% H	15%
Commercial galleries	13%	13%	11%
Bars / lounges	53%	54%	50%
Community centers	57%	57%	59%
Movie theaters	29%	29%	29%
Libraries	42%	41%	49%
Distinctive urban architecture	N/A	66%	N/A
Leisure center/pool/gym	N/A	N/A	72%

Q12. How important is each of the following in providing a mix of recreational, social and cultural amenities throughout the NC?



Types of Open and Green Space

(% ranked very/extremely important)



Q13. How important is provision of each of the following types of open and green space, either within or easily accessible to the NC?



Most Important Types of Educational Opportunities Near NC (% Ranked Very/Extremely Important)	US
High quality nursery schools	68%
High quality primary-secondary schools	82%
Two-year community / vocational-technical colleges	18%
Four-year public and private universities	21%
Major research universities	15%
Part-time advanced degree / professional programs	15%
Adult continuing education	27%

Q14. How important is provision of each of the following types of educational opportunities, either within or easily accessible to the NC?



Most Important Types of Educational Opportunities Near NC (% Ranked Very/Extremely Important)	UK
High quality nursery schools	78%
High quality primary-secondary schools	83%
Strong vocational-technical schools	21%
Easily accessible community colleges	26%
Part-time advanced degree / professional programmes	16%
Adult continuing education	16%
Public and private undergraduate universities	13%
Major research universities	10%

Q14. How important is provision of each of the following types of educational opportunities, either within or easily accessible to the NC?



Most Important in Fostering a Favorable Business Climate (% Ranked Very/Extremely Important)	Total	US	UK
Readily available professional workforce	77%	79% H	68%
"Business-friendly" local government	76%	76%	75%
Balanced mix of professional / technical employees	67%	68%	64%
High worker productivity	61%	63% H	48%
Presence and "clustering" of innovative companies	60%	60%	59%
High degree of profitability in existing businesses	45%	47% H	33%
Low business and personal taxes	40%	40%	45%
Low land and building costs	33%	30%	50% H
Grants and incentives	29%	28%	37%
Presence of firms in international business	17%	15%	30% H
Low wage environment	6%	6%	8%

Q15.1. How important is each of the following in fostering a favorable business climate to incubate new businesses and sustain all businesses in the NC?

© Mahlon Apgar, IV, 2014. All rights reserved.

Most Important Business Real Estate Products/Property Types Near NC (% Ranked Very/Extremely Important)	Total	US	UK
Standard office space	47%	47%	50%
Developable pre-serviced parcels	39%	39%	39%
"Live / Work" units	38%	38%	34%
Shared office space	37%	36%	44%
Business incubation units	37%	36%	43%
Distribution / flex space	28%	27%	36%
Light manufacturing space	17%	16%	21%

Q15.2. How important is each of the following business real estate products, either within or easily accessible to the NC?



External Success Factors that are Most Important in Contributing to the Success of NCs (% Ranked Very/Extremely Important)	Total	US	UK
Attractive / desirable setting	84%	86% H	76%
Regional economic growth	80%	83% H	67%
Supportive policies of local / state governments	78%	78%	77%
Ease of access by mass transit	70%	67%	86% H
Regional population growth	66%	68% H	56%
Diversified business / industry base	58%	59%	50%
Adequate amount / quality of environmental resources	57%	57%	52%
Ease of access by automobile	49%	49%	50%
Multiple generations in local / regional marketplace	46%	47%	39%
Minority / ethnic groups in local / regional marketplace	29%	31% H	21%

Q16.1. How important is each of the following external success factors in contributing to the success of NCs in general, or specific NCs in your organization?

© Mahlon Appgar, IV, 2014. All rights reserved.



Internal Success Factors that are Most Important in Contributing to the Success of NCs (% Ranked Very/Extremely Important)	Total	US	UK
Visionary leadership	87%	88% H	79%
Strong, experienced management	81%	85% H	59%
Adequate / flexible initial financing	76%	77%	68%
Sustainable / stable long-term financing	83%	85% H	69%
Assured delivery capability and timing	66%	67% H	56%
Expert technical support	61%	63% H	50%
Organizational experience / track record	67%	68%	58%
Robust computing / information / management systems	43%	43%	40%
Strong political relationships	69%	72% H	55%
Community engagement / skillful "buy-in"	71%	72%	64%
Environmental sustainability program	53%	53%	56%
Distinctive urban plan / architecture / "sense of place"	N/A	N/A	81%

Q16.2. How important is each of the following internal success factors in contributing to the success of NCs in general, or specific NCs in your organization?

© Mahlon Appgar, IV, 2014. All rights reserved.

External Failure Factors that are Most Important in Contributing to the Failure of NCs (% Ranked Very/Extremely Important)	Total	US	UK
Weak national or regional economy	75%	77% H	65%
Lack of supportive government policies	72%	73%	71%
Diminished population growth / "Shrinking Cities"	65%	67%	59%
Poor mass transit facilities / services	64%	61%	79% H
Congested automobile access routes	58%	57%	62%
Excessive environmental risks (e.g., fire, contaminants)	54%	54%	58%
Strong competitors / competing projects	46%	46%	43%
Area unattractive to specific generations (e.g., seniors)	45%	45%	39%
Weak public policy controls (e.g., carbon emissions)	35%	34%	40%
Area unattractive to specific minority / ethnic groups	30%	30%	27%

Q17.1. How important is each of the following external failure factors in contributing to the failure of NCs in general, and/or specific NCs in your organization?



Internal Failure Factors that are Most Important in Contributing to the Failure of NCs (% Ranked Very/Extremely Important)	Total	US	UK
Inadequate leadership	81%	83% H	70%
Weak management and delivery capabilities	77%	78%	71%
Inadequate / inflexible initial financing	77%	79% H	69%
Insufficient / episodic long-term financing	79%	80% H	70%
Uncertain delivery / timing	N/A	N/A	64%
Insufficient technical support	47%	46%	57% H
Lack of organizational experience / track record	64%	65%	58%
Weak computing / information / management systems	34%	34%	34%
Poor / misdirected political relationships	N/A	N/A	62%
Inadequate community engagement / "buy-in"	N/A	N/A	65%
Shallow environmental sustainability programme	N/A	N/A	41%
Routine, "boring" design	N/A	N/A	61%

Q17.2. How important is each of the following internal failure factors in contributing to the failure of NCs in general, and/or specific NCs in your organization?



Innovations in New Community Planning, Development, and Operations that Have Made Significant Improvement		US
Structure		
Public-private partnership		74%
Unified development corporation		29%
Economics		
Land value model		54%
Sustainable energy rebates		34%
Planning and Design		
Holistic master-planning		52%
“New Urbanism” design		55%

Q18.US. Which innovations in New Community planning, development and operations have significantly improved housing and urban policymaking, residential and community life, business and economic development, and/or real estate management practices?

Innovations in New Community Planning, Development, and Operations that Have Made Significant Improvements	US
Financing	
50-year ground lease	29%
“Waterfall” analytics	38%
Development	
Phased infrastructure/lot sales	62%
1:1 housing/job mix	28%
Construction	
Modular building	39%

Q18.US. Which innovations in New Community planning, development and operations have significantly improved housing and urban policymaking, residential and community life, business and economic development, and/or real estate management practices?

Innovations in New Community Planning, Development, and Operations that Have Made Significant Improvements		US
Marketing		
Homeowner sales office		41%
Minority agent policy		16%
Organization		
Multi-disciplinary planning team		70%
Community services association		34%
Operations		
Service performance metrics		51%
Sensor-driven delivery		16%

Q18.US. Which innovations in New Community planning, development and operations have significantly improved housing and urban policymaking, residential and community life, business and economic development, and/or real estate management practices?

Innovations in New Community Planning, Development, and Operations that Have Made Significant Improvements	UK
Vision	
Long-term community plans	65%
Multiple socio-economic objectives	48%
Structure	
Unified development corporation	40%
Public-private partnership	59%
Economics	
Land value model	58%
Sustainable energy rebates	35%

Q18. Which innovations in New Community planning, development and operations have significantly improved housing and urban policymaking, residential and community life, business and economic development, and/or real estate management practices?



Innovations in New Community Planning, Development, and Operations that Have Made Significant Improvements	UK
Planning and Design	
Holistic master-planning	58%
“New Urbanism” design	48%
Financing	
50-year ground lease	39%
“Waterfall” analytics	32%
Development	
Phased infrastructure/lot sales	63%
1:1 housing/job mix	30%
Land	
Phased drawdown	69%

Q18. Which innovations in New Community planning, development and operations have significantly improved housing and urban policymaking, residential and community life, business and economic development, and/or real estate management practices?

Innovations in New Community Planning, Development, and Operations that Have Made Significant Improvements	UK
Construction	
Modular building	42%
Recycled materials supply chain	41%
Marketing	
Homeowner sales office	48%
Ethnic agent specialists	15%

Q18. Which innovations in New Community planning, development and operations have significantly improved housing and urban policymaking, residential and community life, business and economic development, and/or real estate management practices?

Innovations in New Community Planning, Development, and Operations that Have Made Significant Improvements		UK
Organisation		
Multi-disciplinary planning team		62%
Community services association		29%
Operations		
Service performance metrics		52%
Sensor-based delivery system		25%

Q18. Which innovations in New Community planning, development and operations have significantly improved housing and urban policymaking, residential and community life, business and economic development, and/or real estate management practices?



Percentage Indicating a Preference for These Statements about NCs (% Ranked Strongly/Somewhat Agree)	Total	US	UK
New Communities can be successfully developed in Metro Areas that are centered on thriving Cities with sufficient public policy support for transportation and infrastructure.	92%	92%	93%
New Community developers should commission innovative urban designs that help to enliven building architecture, open spaces, community services, and visitors' experiences.	92%	92%	93%
Market forces create the primary demand for mixed-use (i.e., residential-office-retail-hotel-entertainment etc.) New Communities.	87%	88%	81%
New Communities in urban redevelopment areas offer opportunities for businesses to relocate from suburban areas into cities or to establish new locations within cities.	87%	87%	89%
New Communities will attract an increasing share of new households who seek lifestyle benefits they cannot find in traditional suburbs or urban centers.	86%	87%	81%

Percentage Indicating a Preference for These Statements about NCs (% Ranked Strongly/Somewhat Agree)	Total	US	UK
New Communities should reflect enduring real estate business principles that increase economic values for public and private stakeholders.	85%	85%	82%
New Communities represent potential business opportunities for non-real estate businesses.	84%	84%	81%
New Communities should include affordable housing and/or mixed income residents.	84%	83%	90% H
Growing use of "on-demand" personal transportation (e.g. Bikeshare, Zipcar, Uber) and / or mass transit modes (e.g., light rail, dedicated bus lanes) will have significant impact on the locations and layouts of New Communities.	82%	83%	81%
New Communities can be financially structured to provide attractive risk-adjusted returns for long-term real estate investors.	82%	82%	78%



Percentage Indicating a Preference for These Statements about NCs (% Ranked Strongly/Somewhat Agree)	Total	US	UK
Connections to regional and global economies will significantly influence New Communities locations in the next decade.	81%	81%	81%
New Communities should be incorporated into public policies and planning for the disposition and redevelopment of excess federal and state property.	79%	80%	75%
Advances in technology (e.g. telecommuting) and work practices (e.g. independent contractors) will make New Communities more important in the next decade.	78%	79%	71%
New Communities increase the likelihood of achieving a socially and economically diverse household mix.	69%	68%	74%
New Communities should be "living laboratories" for cross-disciplinary management to discover and test improvements to the community development process.	68%	67%	75%



Percentage Indicating a Preference for These Statements about NCs (% Ranked Strongly/Somewhat Agree)	Total	US	UK
Historical demographic, housing and business trends in Cities and Metro Areas provide good indicators of the potential for New Communities.	67%	66%	70%
New Communities should be planned and developed as integral parts of the US military's Base Realignment and Closure (BRAC) process.	65%	66%	59%
"Big Data" analytics will improve the capabilities of planners and developers to innovate in New Communities.	62%	62%	61%
Technology-based "company towns" (e.g. Facebook's Anton Menlo) will emerge as a popular format for New Communities in the next decade.	42%	41%	43%
"Crowdsourcing" will provide an important new project planning and financing method for New Communities in the next decade.	35%	35%	35%



Most Important Business or Professional Activities of Organization (% ranked in the top 5)	Total	US	UK
Planning	N/A	N/A	69%
Design	N/A	N/A	45%
Planning and Design	N/A	66%	N/A
Land Development	60%	61%	56%
Homebuilding	25%	24%	33% H
Office development	23%	22%	29%
Retail development	29%	30%	25%
Equity investment	28%	28%	27%
Lending	10%	11%	9%

Q39. Please rank the five major business or professional activities of your organization by level of importance, starting from the most important.



Most Important Business or Professional Activities of Organization – Continued (% ranked in the top 5)	Total	US	UK
Professional services	39%	40%	34%
Public sector policymaking	33%	33%	31%
Property management	24%	23%	31%
Private sector administration	23%	24%	20%
Marketing/brokerage/agency	17%	18% H	10%
Other	15%	15%	13%

Q39. Please rank the five major business or professional activities of your organization by level of importance, starting from the most important.



Metro Areas	US
Atlanta-Sandy Springs-Roswell, GA	12%
Austin-Round Rock, TX	8%
Baltimore-Columbia-Towson, MD	7%
Birmingham-Hoover, AL	1%
Boston-Cambridge-Newton, MA-NH	9%
Buffalo-Cheektowaga-Niagara Falls, NY	1%
Charlotte-Concord-Gastonia, NC-SC	6%
Chicago-Naperville-Elgin, IL-IN-WI	8%
Cincinnati, OH-KY-IN	2%
Cleveland-Elyria, OH	2%
Columbus, OH	3%
Dallas-Fort Worth-Arlington, TX	14%
Denver-Aurora-Lakewood, CO	10%
Detroit-Warren-Dearborn, MI	2%
Hartford-West Hartford-East Hartford, CT	1%

Metro Areas	US
Houston-The Woodlands-Sugar Land, TX	9%
Indianapolis-Carmel-Anderson, IN	2%
Jacksonville, FL	3%
Kansas City, MO-KS	3%
Las Vegas-Henderson-Paradise, NV	3%
Los Angeles-Long Beach-Anaheim, CA	20%
Louisville/Jefferson County, KY-IN	1%
Memphis, TN-MS-AR	2%
Miami-Fort Lauderdale-West Palm Beach, FL	5%
Milwaukee-Waukesha-West Allis, WI	<1%
Minneapolis-St. Paul-Bloomington, MN-WI	2%
Nashville-Davidson--Murfreesboro--Franklin, TN	3%
New Orleans-Metairie, LA	2%
New York-Newark-Jersey City, NY-NJ-PA	16%
Oklahoma City, OK	1%

Q40. Please select up to five Metro Areas in which your organization has focused its main business or professional activity.



Metro Areas	US
Orlando-Kissimmee-Sanford, FL	7%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	6%
Phoenix-Mesa-Scottsdale, AZ	10%
Pittsburgh, PA	2%
Portland-Vancouver-Hillsboro, OR-WA	4%
Providence-Warwick, RI-MA	1%
Raleigh, NC	4%
Richmond, VA	3%
Riverside-San Bernardino-Ontario, CA	4%
Rochester, NY	1%
Sacramento--Roseville--Arden-Arcade, CA	3%
Salt Lake City, UT	2%
San Antonio-New Braunfels, TX	4%

Metro Areas	US
San Diego-Carlsbad, CA	7%
San Francisco-Oakland-Hayward, CA	15%
San Jose-Sunnyvale-Santa Clara, CA	5%
Seattle-Tacoma-Bellevue, WA	7%
St. Louis, MO-IL	3%
Tampa-St. Petersburg-Clearwater, FL	6%
Virginia Beach-Norfolk-Newport News, VA-NC	2%
Washington-Arlington-Alexandria, DC-VA-MD-WV	23%

Q40. Please select up to five Metro Areas in which your organization has focused its main business or professional activity.

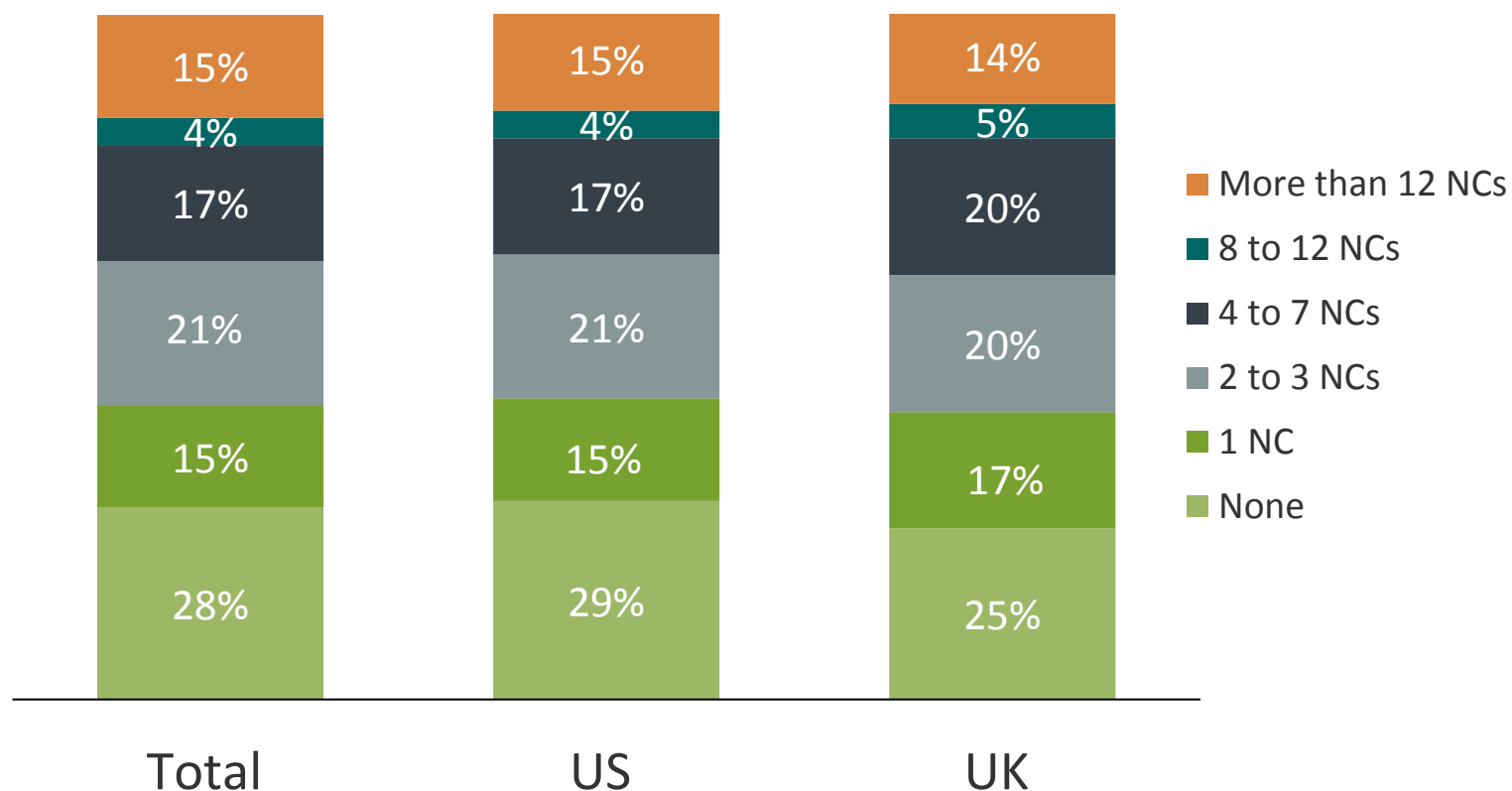


Urban Areas	UK
Birkenhead	1%
Bournemouth	0%
Brighton and Hove	1%
Bristol	8%
Cardiff	3%
Coventry	1%
Greater London Built Up Area (BUA)	31%
Greater Manchester BUA	19%
Kingston upon Hull	3%
Leicester	4%
Liverpool BUA	8%
Newport	1%
Nottingham BUA	4%

Urban Areas	UK
Preston	1%
Reading	4%
Sheffield	4%
South Hampshire BUA	2%
Southend on Sea	0%
Stoke	0%
Sunderland	1%
Swansea	1%
Teeside	0%
Tyneside BUA	5%
West Midlands BUA	18%
West Yorkshire BUA	8%

Q40. Please select up to five Urban Areas in which your organisation has focused its main business or professional activity, by level of importance to your organisation, starting from the most important.

Number of New Communities in which Organization Has Performed Business or Professional Activity



Q42. In how many New Communities has your organization performed its principal business or professional activity?



Proportions of Organization's Total Budget or "Organizational Effort" Allocated to Project Types (Mean proportion between 0% and 100%)	Total	US	UK
Greenfield	40.57	40.48	41.01
Urban Renaissance	50.87	50.27	53.99
Other	49.46	50.34	44.12

Q43. What proportion of your organization's total budget or "organizational effort" is allocated to Greenfield, Urban Renaissance, and other project types?



Typical Size of New Communities with Which Organization is Involved	US	Typical Size of New Communities with Which Organisation is Involved	UK
Fewer than 10 acres (<4 Ha)	7%	Fewer than 10 Hectares	10%
11 to 25 acres (4 to 11 Ha)	9%	11 to 24 Hectares	15%
26 to 50 acres (11 to 20 Ha)	12%	25 to 50 Hectares	16%
51 to 100 acres (21 to 40 Ha)	12%	51 to 99 Hectares	12%
101 to 499 acres (41 to 202 Ha)	19%	100 to 499 Hectares	26%
500 to 999 acres (203 to 404 Ha)	14%	500 to 999 Hectares	8%
1,000 to 2,499 acres (405 to 1,011 Ha)	16%	1,000 to 2,499 Hectares	7%
2,500 to 4,999 acres (1,012 to 2,023 Ha)	6%	2,500 to 4,999 Hectares	0%
5,000 to 9,999 acres (2,023 to 4,046 Ha)	2%	5,000 Hectares or more	0%
10,000 acres (4,047 Ha) or more	4%	Other	5%

Q44. What is the typical size of the New Communities in which your organization is involved?

INNOVATIONS IN NEW COMMUNITIES SURVEY 2014

ANALYSIS FOR

MAHLON APGAR, IV

NEW COMMUNITIES ANALYTICS RESEARCH TEAM

University of Michigan

Taubman College of Architecture and Urban Planning

Ian Trivers M.A.

Stephen Buckman, Ph.D., M.P.A.

Carla Maria Kayman, A.M.

Tristan Black, B.S.

November 2014

1. Methodology

Two surveys were developed by Sandy Apgar, with the support of a Working Group comprised of members, staff and advisors from the Royal Institution of Chartered Surveyors (RICS) and the Urban Land Institute (ULI), with additional contributions from members of the Counselors of Real Estate (CRE), the National Town Builders Association (NTBA), the Royal Town Planning Institute (RTPI), and the Town and Country Planning Association (TCPA). The first survey, referred to as the United States (U.S.) Survey, was developed for U.S.-based members of these organizations. The second survey, referred to as the United Kingdom (U.K.) Survey, was adapted by Apgar, in consultation with U.K.-based Working Group members, from the U.S. Survey, for U.K.-based members of all the organizations to reflect differences in language and usage between the countries. The ULI distributed both Surveys to its members based on their addresses of record, with cover letters from its Chair and CEO. The other organizations posted links to both Surveys on their respective Websites, with invitations to participate from their respective leaders. There were no controls on participating in the survey and anyone with the link to either survey could participate and forward/invite others; participants were identified in the surveys by a series of demographic questions and duplications were eliminated. The surveys were available from June 9, 2014 to September 8th 2014. Median time to take the survey was 30 minutes. There was no compensation for participation but respondents were offered access to a summary report of the findings before their release to the general public.

All surveys were administered and collected in a web-based interface by Rockbridge Associates of Great Falls, Virginia, who were retained by the study's author; Rockbridge also produced a detailed report on the survey data. The Rockbridge report and survey data were independently analyzed by a research team at the invitation of the study's author; this team was introduced by Professor Douglas Kelbaugh of the Taubman College of Architecture and Urban Planning at the University of Michigan. Further analysis and description of the results were conducted by the study's author, in consultation with the aforementioned Working Group.

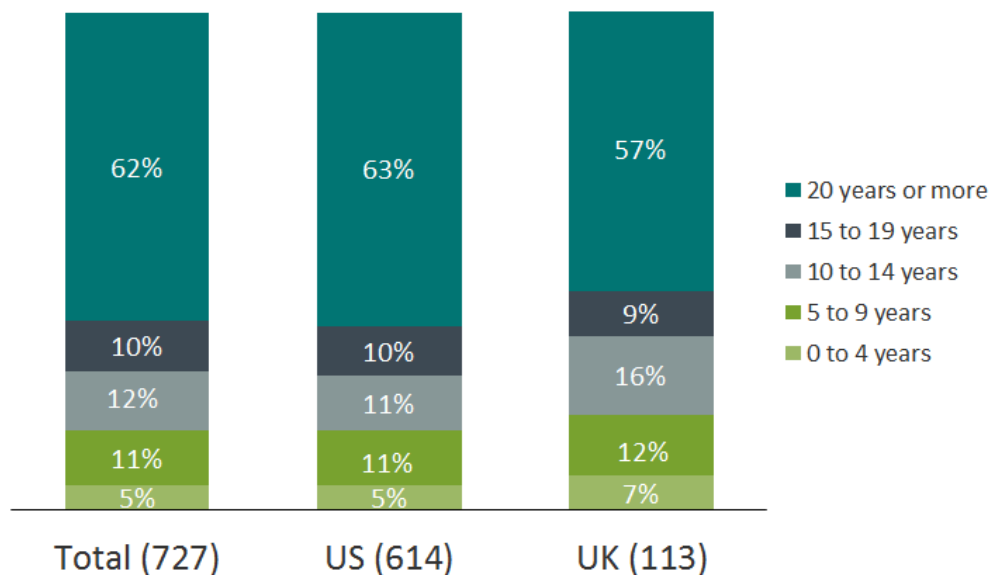
The surveys consisted of 58 questions of which respondents were offered all questions to complete the survey. Questions represented a mix of multiple choice, ranking, and sum allocation questions. The first section consisted of "demographic" information about experience and affiliations. As well, a small section at the end collected information on respondents' employer activities and organizational structures. The bulk of the survey collected attitudes and opinions on a wide variety of topics related to the concept of "new communities". Questions focused on new communities generally and some asked for further detail on attitudes and preferences on the subcategories of "greenfield" and "urban renaissance" new communities. The survey sought to develop more detailed definitions of new communities and its two subcategories from respondents and defined them broadly in the survey introduction and instructions: "NCs [new communities] are defined here as planned, long-term, mixed-use, residential settlements for populations from 1,000 to 100,000, located in urban or suburban areas of the US and UK. NCs are holistically designed, developed and managed by single, unified organizations". Further elaboration of the survey purpose and definitions, as well as a hyperlink to additional information, was provided on the instructions page.

While the survey results provide a wealth of data for analysis through various methods, the focus of this initial analysis is on the overarching themes around the definitions, expected success, failure factors and the future outlook for new communities. A large amount of the data was cross-tabulated to look at relationships between variables, not all of which is used for this report. Independent T-Tests were used for means (based on test for equal variances) and Independent Z-Test for percentages (unpooled proportions). Because of the response rates and question design, only a moderate number of statistically significant correlations were found, with less in the smaller UK sample. When statistically significant findings are mentioned in this analysis it indicates the use of a 95% confidence interval.

2. Key Characteristics (Demographics) of Respondents

A key component of the survey was to understand the demographic makeup of those taking the survey and what portion of the total respondents each demographic area constituted. A total of 727 respondents completed the survey with 614 completing the U.S. survey and 113 completing the U.K. survey. While the number of respondents is significantly different for the two questionnaires, a smaller number of U.K. respondents relative to the U.S. was expected based on different populations and economic size. The first section of the surveys collected information about the experience, interests and organizations of respondents.

Question S.1: Of all respondents, 63% had 20 years or more experience in real estate, housing, urban planning and other related fields. In the U.S., 62% had 20 or more years of experience while an additional 32% had 5 to 19 years of experience and only 5% had 0 to 4 years of experience. Experience levels in the U.K. were similar with 57% of participants having 20 years or more of experience, and with slightly higher numbers having less experience. Overall the respondents had a wealth of experience in the real estate industry and related fields.



Question S.2: Of all respondents, 69% have been involved with mixed-use projects of 1,000 or more residents. Sixty-six percent of U.S. respondents have experience with mixed-use projects of 1,000 or more residents. U.S. respondents with 10+ years of experience were statistically significantly more likely to have worked on such projects than those with only 0 to 4 years of experience. Eighty-one percent of the U.K. respondents have been involved with mixed-use projects of 1,000 or more residents, revealing that they had considerably more experience with such projects than U.S. respondents, reflecting what would be expected due to different historical development patterns.

Question S.5: When asked what professional and industry organizations they belonged to, respondents in the U.S. replied with 95% membership in ULI. Other notable organizations were the American Planning Association at 29% and 40% for other. In the U.K. the respondents surprisingly answered ULI as the highest membership at 56%, then other at 36%, Royal Institution of Chartered Surveyors came in at 23%, and Royal Town Planning Institute membership was 22%.

Question S.6: In regards to the highest role that respondents had in such projects, overall 27% of respondents indicated they participated as an owner, partner, principal or senior public official, 23% selected other. In the U.S., 28% participated as an owner, partner, principal or senior public official, 23% selected other, and 16% worked as functional specialists. Of U.K. respondents, 24% acted as an owner, partner, principal, or senior public official, 19% as other, and 16% as a property professional.

Question S.3: The current position held by all respondents included 42% owner, partner, principal, or senior public official with no other category rising above 12% of the remaining respondents. In the U.S. the current positions held by respondents were 43% owner, partner, principal, or senior public official. The remaining responses were divided almost evenly over the remaining possible responses such as general manager with departmental or business unit responsibility, general manager with organization-wide responsibility, senior real estate executive covering activities in more than one city, real estate professional covering activities in only one city, functional specialist (e.g., finance, marketing, planning) with organization-wide responsibility, and functional specialist with departmental or business unit responsibility, and other. In the U.K., 33% responded as owner, partner, principal, or senior public official. Similar to the U.S. the remaining responses were divided almost evenly across the other possible selections.

Question Q.39: When surveyees were asked to rank the five most important major business or professional activities of their organization, the responses were nearly the same in each country. The U.K. and U.S. respondents listed planning/planning and design (69% and 66% respectively), and land development (56% and 61% respectively) as the most important activities within their organization.

Question Q.40: Respondents in both countries were asked to indicate the five major metro areas where their organizations had previously focused their activities. In the U.S., Washington D.C., Los Angeles, New York City, San Francisco, Dallas/ Fort Worth, and Atlanta were the top selections. In the U.K., Greater London, Manchester, Midlands, Yorkshire, and Liverpool were the most common.

Question Q.42: In total, 15% of respondents have worked on 12 New Communities projects or more, 21% on 4-12 and 28% on none. In the U.S., the majority of respondents' organizations have worked to create New Communities: 43% have participated in 1 to 7, 15% completed more than 12, but 29% had not worked on any. In the U.K., 57% worked on 1 to 7, 14% worked on more than 12, and 25% have not participated in the creation of any showing that both countries are quite similar in their experience levels.

Question Q.43: When asked what proportion of the respondents organizational efforts went to the creation of Greenfield New Communities, respondents indicated 40% in the U.S. and 41% in the U.K. (mean proportion between 0% and 100%). For Urban Renaissance New Communities, respondents in the U.S. indicated 50% and U.K. respondents indicated 54% (mean proportion between 0% and 100%). Again, the responses were remarkably similar between the two countries and show that Urban Renaissance New Community projects receive more organizational attention among respondents than Greenfield projects, but not overwhelmingly.

Question Q.44: In the U.S. responses on the typical size of New Communities that their organizations have been involved in, 57% chose 26 to 2,500 acres (11- 1,012 hectares)¹. In the U.K., 26% of respondents chose 100-499 hectares (247-1,233 acres), 39% chose 11 to 99 hectares (27- 245 acres), and none chose 2,500 hectares (6,178 acres) or higher.

Question S.4: When asked about their level of interest in the New Communities as a concept for developing new greenfield sites and/or redeveloping-revitalizing existing urban areas, 96% of U.S. respondents replied as either very interested or somewhat interested with 67% of those indicating very interested. As for the U.K. respondents, 90% chose either very or somewhat interested, yet only 48% of those responded as very interested – showing a little less enthusiasm overall than the U.S. respondents. Overall interest was extremely high, with stronger interest in the U.S. than in the U.K.

3. New Communities

3.1 The Big Picture: What New Communities Do and Should Do

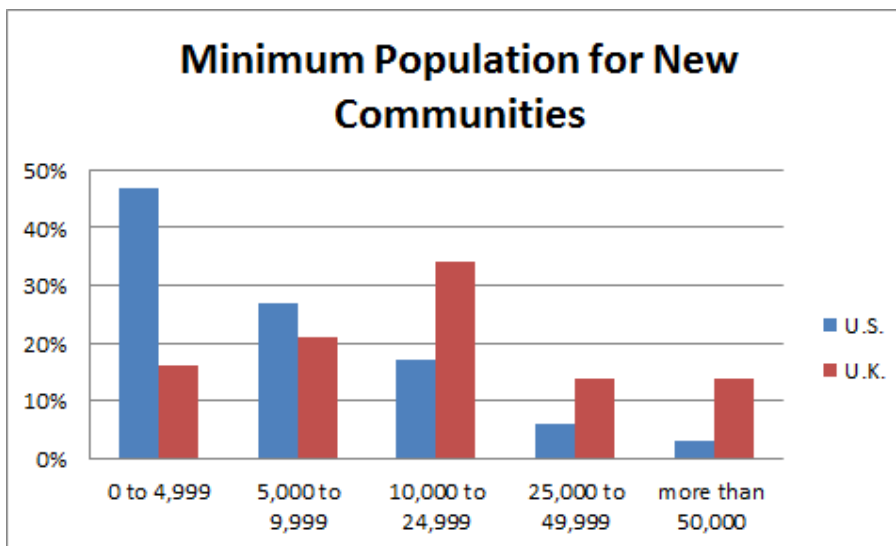
Questions Q19-38: Both countries were asked to respond to various potential features and aims of New Communities by level of agreement. These were described as what New Communities do and should do. The U.S. top twos (choices that a majority of respondents marked a “very important” or “important” and will be referred to in this document as “top two”, not just the top two most popular answers overall) included improved lifestyle, market forces driving trends, technology improvements, personal transportation improvements, and connections with global economies. The U.K. top twos included personal transportation, public transportation support, improved lifestyle, connections with global economies, urban regeneration/business relocation, affordable housing and mixed income, innovative design, real estate value stability, and utilizing excess public property. Throughout the surveys, transit was surprisingly more important to respondents in the U.S. than expected, but clearly more dominant in the U.K.

¹ Measurement conversions are approximate.

Question Q.6.:The surveyees were asked what five most important community facilities and/or services should be incorporated in a Greenfield or Urban Renaissance New Community, assuming they could be provided by a public, nonprofit, or private organization. Like in previous questions, there were some small differences in the question structure. Overall, there were many similarities between the two countries. In the U.S., top ranked items included neighborhood shops (77%), open spaces/parks (79%), access to public transportation (74%), leisure activities (like movie theaters) (69%), schools (Pre-K through High) (63%) and walking/bike paths (64%). In the U.K, findings were quite similar, with a few key differences. There, respondents chose access to public transit (89%) neighborhood shops (83%), schools (Pre-K through High) (81%), open spaces (65%) and leisure activities (54%). While transport was more important in U.K., both countries clearly agreed on the most important services and facilities offered as selections. The most notable differences were that U.K. ranked schools higher (81%) than those in the U.S. (63%) and U.S. respondents viewed walking and bike paths as more important (64%) than those in the U.K. (39%).

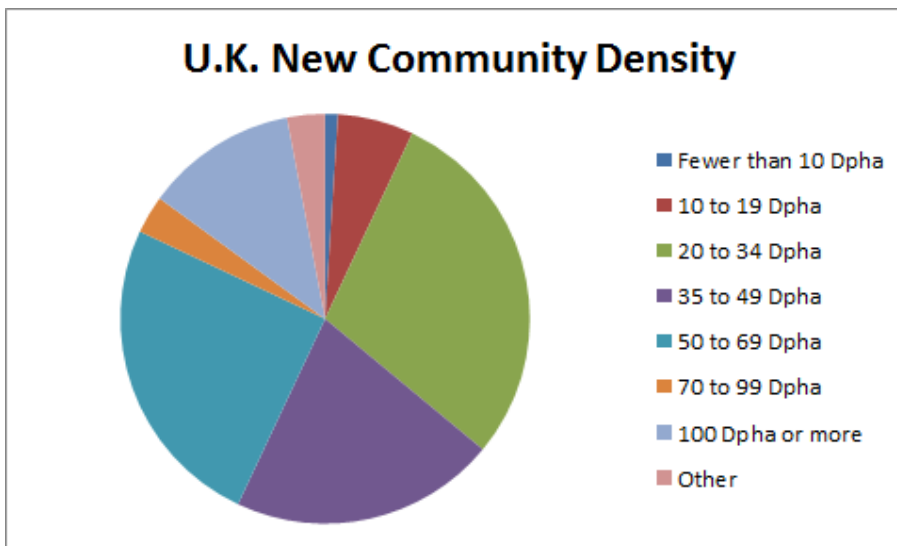
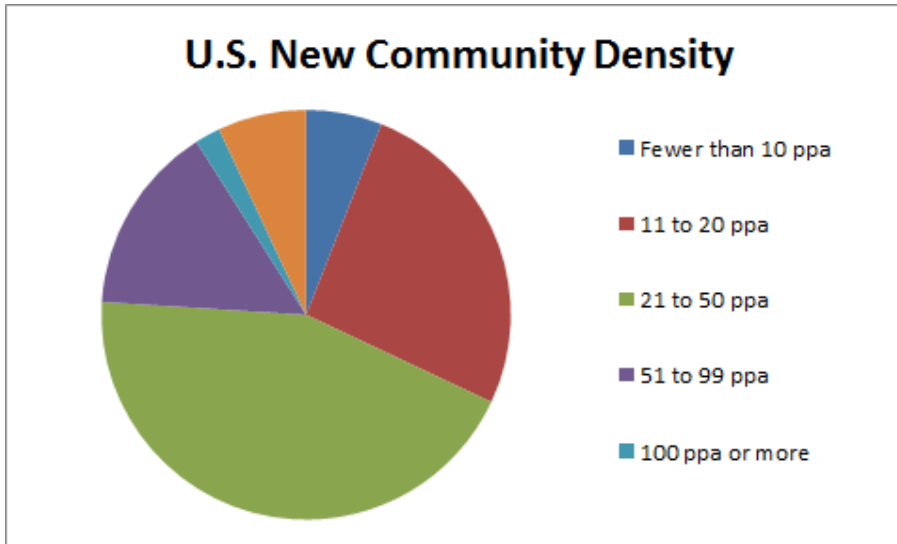
3.2 Population

Question Q.1.: In the U.S. 62% of respondents chose 1,001-9,999 residents as the minimum population that a NC must have to be successful, and only 3% chose 50,000 residents or more. In the U.K., the selections to choose from differed by the addition of larger resident counts as well as different increments; 25% responded with 7,499 or fewer residents, 60% selected 7,500-49,999 residents, and only 6% said 100,000 residents or more. Overall, U.K. respondents preferred a wider range of populations and somewhat larger populations though neither group displayed much interest in the higher end of population size.



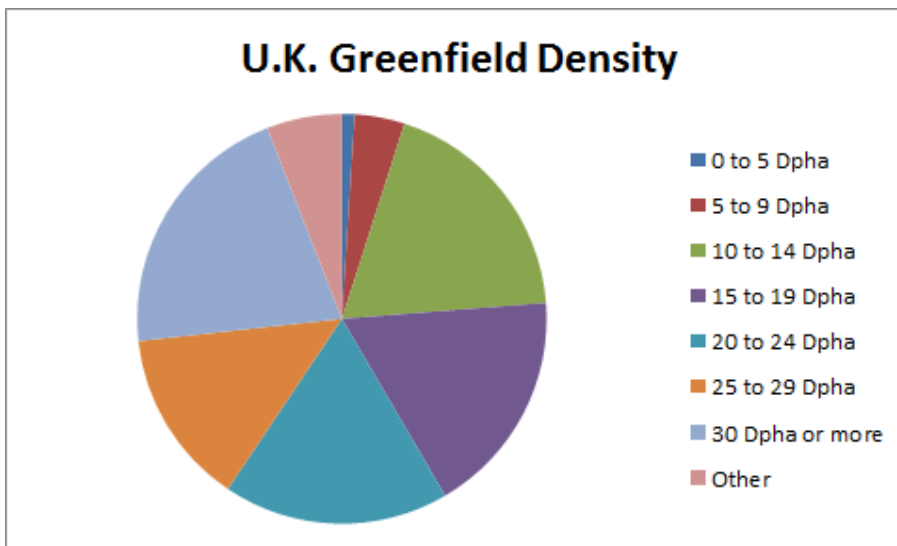
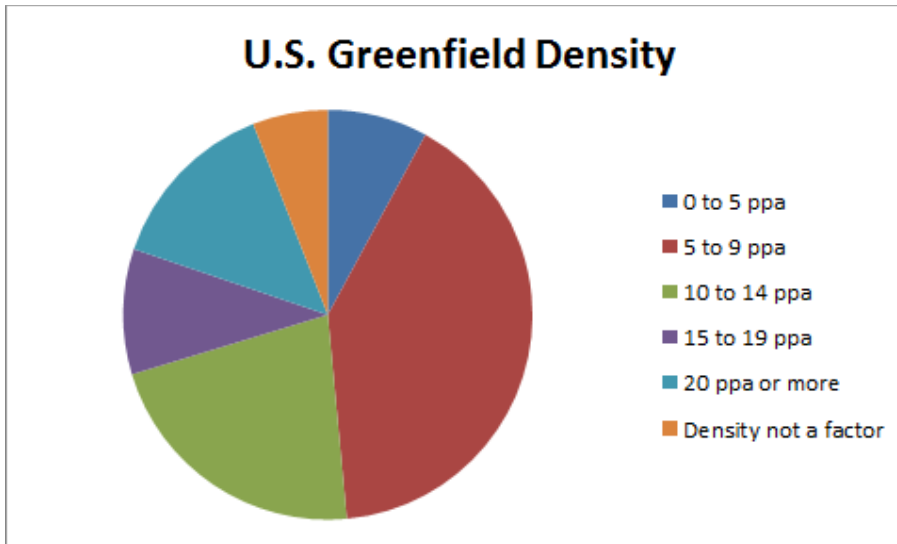
3.3 Density

Question Q.3.3: Forty four percent (44%) of U.S. respondents answered that the average population density necessary for a New Community to be successful is 21 to 50 ppa (persons per acre); 26% said 11 to 20 ppa. U.S. responses skewed toward the mid to lower density. The U.K. respondents were more clustered around the middle density range: 29% chose 20-34 dpha (dwelling units per acre), 25% chose 50 to 60 dpha, and 21% chose 35 to 49 dpha. Only 7% of respondents in the U.K. chose 19 dpha or less.



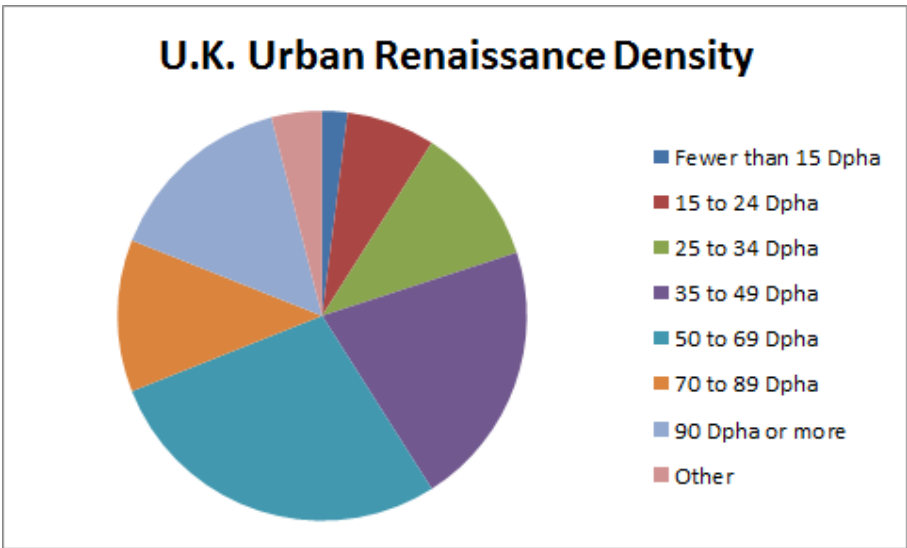
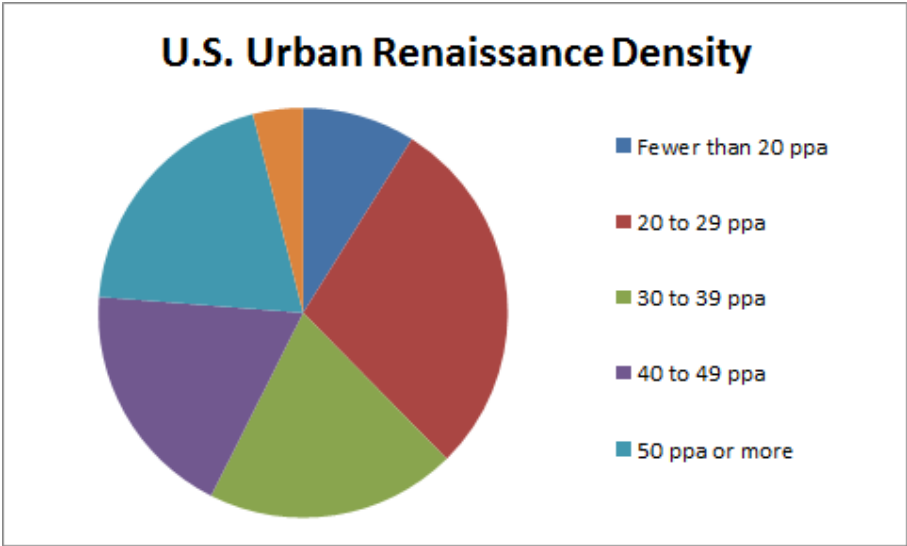
Question Q.3.1 Forty one percent (41%) of the respondents in the U.S. chose 5 to 9 ppa (persons per acre) as the minimum density that would be expected for a successful Greenfield

New Community in the U.S.; 22% chose 10 to 14 ppa, 8% said fewer than 5ppa, and 6% said that it didn't matter. In the U.K., respondents were more divided: 21% chose 30 or more dpha (dwelling units per hectare), 19% chose 10-14 dpha, 18% chose 15-19 dpha, 18% chose 20-24 dpha, and only 1% said fewer than 10 dpha. In the U.K. survey, the option of answering "doesn't matter" was not supplied.



Question Q.3.2: Similarly, when asked what minimum density would be expected for a successful Urban Renaissance New Community, the U.S. replied with responses covering the entire selection range. Forty five percent (45%) selected that density was not a significant factor, a surprising and important finding that may indicate a wide variety of possible concepts of Urban Renaissance New Communities. Of those that indicated a density, 29% chose 20 to 29 ppa (persons per acre), 20% chose 30 to 39 ppa as well as 50 ppa or more, 19% chose 40-49 ppa,

and only 9% selected fewer than 20 ppa. In the U.K., 28% chose 50 to 69 dpha (dwellings units per hectare), 21% chose 35-49 dpha, 25% said fewer than 15 dpha, and 15% said 90 dpha or more. Both countries respondents favored higher densities, when they think density matters.



3.4 Land Area

Question Q.2: In the U.S., 21% responded that the minimum land area that a New Community must have to be successful is 101 to 499 acres (40.87-201.9 hectares), 19% chose 51 to 100 acres (20.6-40.47 hectares), with few responding to the very high and very low land area options. U.S. respondents with 20 or more years of experience were statistically significantly more likely to choose the two higher categories of size (acres) of new communities than the lowest (Table S.1 US page 1). Respondents with 5 to 9 and 10 to 14 years were

statistically significantly more likely to choose less than 51 acres (20.6 hectares). Similarly, those who had worked on a mixed- use project with 1,000 or more residents in U.S. were more likely to favor larger sized new communities than those who had not favored smaller. Of the U.K. respondents, 31% chose 100 to 499 hectares (247- 1,233 acres), with the remaining responses spread evenly otherwise. Respondents with more experience tended towards the same area, while younger field members aimed slightly higher or slightly lower at first.

Question Q.4.1: The surveyees were then asked what the ideal land area for successful Greenfield New Communities would be. While the questions for the U.S. and the U.K. were not worded exactly the same, they carried the same message. In the U.S., the respondents favored the lower ranges, 79% chose 2,499 acres or fewer (1,011 hectares or less), only one respondent chose 15,000 acres or more (607 hectares or more). In the U.K., the responses also favored smaller sizes. 26% chose 500 to 999 hectares (1,236 to 2,469 acres), 25% chose 1,000 to 2,499 hectares (2,471 to 6,175 acres), 1 person chose 10,000 hectares (24,710 acres), and overall only 13% chose 2,500 hectares (6,177 acres) or more.

Question Q.4.2: Surveyees were also asked what would be the ideal land area for successful Urban Renaissance New Communities would be. Similar to the previous question, the units of measurement as well the as the question wording were different. Of respondents in the U.S., an overwhelming 80% said 99 acres or fewer (40 hectares or fewer) and 47% of that response group selected 11 to 50 acres (4.5- 20 hectares) showing that the majority favored smaller Urban Renaissance developments. In the U.K. 28% chose 100-299 hectares (247 to 739 acres) and 21% chose 25 to 49 hectares (62 to 121 acres) and 14% selected 300 hectares (741 acres) or more reflecting that the majority was also leaning toward smaller development projects.

3.5 Travel Time

Question Q.5.1: In the U.S., 71 % selected 15-44 minutes as the maximum travel time from a Greenfield New Community to the nearest major city center by car that would attract residents and employees. In the U.K., 74% of the respondents chose 15-44 mins as well, 29% of those chose 15-29 mins, and 20% chose 45-59 mins. The U.K.'s responses reflected that they were more accepting of travel time by car, possibly indicating the importance of a transit connection and/or that the Greenfield New Communities are seen as more stand-alone than in the U.S.

Question Q.5.2: When asked what the maximum travel time from an Urban Renaissance New Community to the nearest major urban center by mass transit that would attract residents and employees was, 67% of U.S. respondents chose 10-29 minutes. In the U.K., 71% of respondents chose 10-29 minutes and 28% said 10-14 minutes revealing that the U.K. expects shorter travel time by mass transit. Responses are remarkably similar between the U.S. and U.K. on this question.

3.6 Income Levels and Tenure in Housing

Question Q.8.1: The surveyees were asked various questions regarding income levels and housing tenure. The first was "How important is each income level to successful

development of owner-occupied and rental housing in a New Community?" The question was divided among income quintiles from the top 20% being in quintile 1 (top) to the bottom 20% being in quintile 5 (bottom). In the U.S., 71% of respondents selected the second quintile as extremely or very important, 57% selected the third quintile, 41% chose the top quintile, 30% chose the 4th quintile, and 17% selected the bottom quintile. In the U.K., 60% chose the second quintile as extremely or very important, 53% chose the third quintile, 43% selected the fourth quintile, 28% selected the top quintile, and 27% chose the bottom quintile. Overall both sets of respondents were in agreement on the middle quintiles, but not on the upper and lower quintiles.

The second income/housing question was "What mix of housing types should be offered for multiple income levels in a New Community? This was another question with slightly different wording as well as similar, yet differing, selection choices between the two surveys. It was a two-part question with one area addressing tenure and the other, typology.

Question Q.8.3: In the U.S., typology options included Single Family Detached (with 51% choosing 1-25% and 36% choosing 1-50%), Single Family Attached Townhomes (with 70% choosing 1-25%, 30% choosing 26-50%, and no one responding with a higher amount), Multifamily Low-Rise (with 77% choosing 1-25%), Multifamily Midrise (with 73% choosing 1-25% and 25% choosing 26-50%), Multifamily High Rise (with 73% choosing 1-25%, and 15% choosing 0%), and Other (with 53% choosing 1-25% and 44% chose 0%). In the U.K., the responses included Detached (with 67% choosing 1-25%), Semi-Detached (with 53% choosing 1-25% and 42% choosing 26-50%), Low-Rise Block Apartments (with 73% choosing 1-25%), Mid-Rise Apartments (with 74% choosing 1-25%), High-Rise Apartments (with 57% choosing 1-25%), and Other (with 78% choosing 1-25%).

Question Q.8.2: In response to the question of tenure, the U.S. options included Owner-Occupied (with 85% choosing 26-75% and 52% choosing 26-50%), Market Rental (with 33% choosing 1-25%, 60% choosing 26-50%, and only 7% choosing more than 50%), Income Subsidy (with 88% choosing 1-25%, 2% choosing more than 50% and 10% choosing zero), Unit Subsidy (with 88% choosing 1-25%, 3% choosing 50% or more, and 9% choosing zero), and Other (with 97% choosing 0-25%). In the U.K., the tenure options included Owner-Occupied (with 61% choosing 26-50%), Market Rental (with 61% choosing 1-25% and 37% choosing 26-50%), Affordable Units (with 92% choosing 1-25%), Mixed Tenure (with 87% choosing 1-25%), and Other (with 74% choosing 1-25%).

While some terminology and category differences should be noted in comparing the two groups of respondents, overall the U.S. respondents favored the top quintile more and the fourth and bottom quintile less than respondents in the U.K. In terms of typology, the UK favored attached homes and low-rise apartments more than the U.S., which favored detached homes the most. Still, there was a fairly even distribution among all types offered except high-rise, which was the least favored in both countries. The U.K. also preferred detached homes more than expected, though not as much as U.S. Both countries viewed detached homes as 1-25% of a New Community and expected a mix of housing types, with high rises slightly less popular in U.S.

3.7 Community Amenities and Services

Question Q.9: *Safe, secure environments*. In response to the question of how important certain options were in providing a safe, secure environment for residents, employees, and visitors in a New Community there was marked agreement between the two countries with on-street lighting, visible police presence and tight building control access being key in both countries. Forty three percent (43%) in the U.S. chose visible police presence, and 61% chose bright street lighting. In the U.K., 49% chose bright street lighting, and 81% said low crime rates. It should be noted that the option of low crime rate was not offered to U.S. respondents.

Question 10: *Retail development*. In terms of retail development, there were more differences between the two countries. Eighty three percent (83%) of U.S. respondents chose ample neighborhood supermarkets and convenience stores as one of the top two most important factors in providing attractive shopping opportunities for residents, employees, and visitors in a New Community. Sixty nine percent (69%) chose moderately priced restaurants, and 50% chose local or specialized boutiques. Interestingly, of those surveyed in the U.S., 32% responded that big box stores were not important at all. No respondents selected moderately priced restaurants as not important at all. Sense of place was not offered as an option in the U.S. survey, but in the U.K., 77% of respondents chose it as one of their top twos. Eighty-four percent of that 77% were more experienced respondents. Forty eight percent (48%) chose moderately priced restaurants and 66% selected ample neighborhood markets or convenience stores. Again, in this question, the wording and selection options differed somewhat.

Question Q.11: *Transportation*. In terms of transportation facilities and services, the two sets of respondents answered similarly except on rapid bus service, which was ranked much higher in the U.K. than in the U.S. U.S. respondents selected mass transit and light rail as the top two most important factors for providing effective transportation facilities and services in New Communities (58%). Forty seven percent (47%) selected highways as one of the top two and 45% chose bus rapid transit (BRT) showing that access to outside areas as well as speed are paramount. In the U.K., 68% of respondents chose the BRT as one of the top twos, 64% chose light rail, and 43% chose motorway access reflecting that public transport is of the utmost importance. Both countries agree that transportation access in a New Community is very valuable with mass transit, rapid bus, and highway access as the notion that new communities are understood as deeply embedded in a region and not as standalone places.

Question Q.12: *Recreation*. In response to the question of "How important is each of the following in providing recreational, social and cultural amenities throughout the New Community?" responses were again quite similar. Fifty-seven percent of the U.S. respondents chose community centers as one of the top two. 54% selected bars, arts, and venues, and 66% chose architecture. U.K. responses varied somewhat from those of the U.S. survey. The U.K. responded with 72% choosing leisure centers, 59% choosing community centers, 50% choosing pubs or bars, and 49% choosing libraries. Excluding the differences in the response choices, the only major difference between the two countries was on arts venues, which were not highly ranked in the U.K. at 15% but were ranked as important by 49% of respondents in the U.S.

Question Q.13: *Open space*. When asked what would be necessary in terms of types of open areas, green space and parkland, either within or easily accessible to the New

Community, the U.S. respondents selected 91% parks and open space as one of their top twos, walking paths were 88%, bike paths were 83%, urban farms and gardens were 33%, woodlands were 32%, and playing fields were 61%. In the U.K., 89% of respondents chose parks and open space as one of their top twos, 82% chose walking paths, 75% chose playfields, 74% chose cycle paths. While parks and open space, walking paths, and playing fields were key in both countries, woodlands and urban farms were of less interest in UK.

Question Q.14: *Education*. In regards to the level of importance of certain types of educational opportunities, either within or easily accessible to the New Community, the U.S. top twos were high quality nursery schools, primary schools, and secondary/high schools. The U.K. responses mirrored those of the U.S. Universities and adult education proved to not be important, giving a sense that New Communities are viewed as residentially focused.

Question Q.15.1: *Business climate*. On the issue of fostering a favorable business climate and incubating new businesses to sustain all businesses in a New Community, responses were very similar with two exceptions. The U.S. respondents selected a business friendly local government and a readily available professional/technical workforce as their stand out top twos. The U.K. top twos included a balanced mix of technical and professional workers, a readily available professional workforce, a business friendly local government, and the clustering of innovative companies. The workforce was a clear point of agreement for both countries as was supportive local government. The two most striking differences, though not among the top ranked items, were land and building costs and presence of firms in international business. While not as important as those mentioned above, 50% of U.K. respondents said low land and building costs were important while only 30% of U.S respondents said the same. Also, while only 30% of U.K. respondents said the presence of firms in international business was important, a very low 15% said the same in the U.S.

Question Q.15.2: *Business property*. When asked how important certain business property types were, either within or easily accessible to the New Community, there were no standout responses with standard office space getting the highest ranking at only 47% overall. The two countries respondents were almost exactly the same. The U.S. did not have any stand out top twos (none of the choices received 50% or more of respondents' rankings as "important" or "very important"), which indicates that respondents may not find business property to be significant to the success of a New Community. Standard office space was the highest ranked at only 47% and manufacturing space was selected as the least significant with only 16% of responses. The U.K. did not have a dominant response either, although 50% selected standard office as a top two, 44% chose shared office space, and 43% chose business incubation space. Neither country found major significance in business property types reflecting that their idea of New Communities are predominantly housing and amenity based.

4. Innovations, Organizational Structure and Success Factors

4.1 Innovations, Development and Organizational Structure

Question Q.18: When asked which innovations in New Community planning and development have significantly improved housing and urban policymaking, residential and community life, business and economic development, and/or property management practices,

the U.S., respondents' top two choices included public-private partnerships and a multi-disciplinary planning team. In the U.K., the top twos were slightly more spread out among long-term plans, phased infrastructure, lot sales, phased drawdown, and a multi-disciplinary planning team. Both countries agreed that multidisciplinary planning teams were considered a significant innovation, but the U.K. recognized many more potential innovations than in the U.S. The U.K., however, did not choose public-private partnerships even though this type of structure appears to be becoming more common in the U.K.

Question Q.7: When asked which of the following objectives is most important in adopting a public-private partnership model for New Communities, crafting its features, and structuring relationships among the partners, starting with the most important, the responses were nearly identical in both countries. Fifty four percent (54%) of respondents in the U.S. chose attracting long-term financing as the most important and 43% chose deepening political support as the second. In the U.K., attracting long term financing was rated most important by 43% of respondents and 34% chose deepening political support as second. Overall, the answers between the two countries were quite similar and prioritized long-term financing and deepening of political support.

4.2 Success Factors

Question Q.16.1: When asked how important certain external success factors were in contributing to the success of New Communities in general or specific New Communities in their organization, there were some slight differences between the two countries. The U.S. responded with 86 % selecting an attractive and desirable setting as one of their top twos, 83% selected regional and economic growth, and 78% selected supportive government. In the U.K., 86% chose ease of access to public transit as one of their top twos, 77% chose supportive local government, 76% chose an attractive desirable setting, and 67% chose economic regional growth. While both countries agreed that regional economic growth and supportive local government are key, in the U.K. transit stands out as important as well.

Question Q.16.2: There were a few major competitors for the top two selections of how important certain internal success factors were in contributing to the success of New Communities in general or specific New Communities in their organization. For both the U.K. and the U.S., these included visionary leadership, strong management, sustainable financing, political relationships, and community support and engagement.

Question Q.17.1: The top two selections made by the U.S. regarding how important certain external factors were at impeding development of successful New Communities or contributing to their failure included insufficient economic and political support and shrinking population. In the U.K., the front runners were lacking government support, poor public transport infrastructure, and the weak economy.

Question Q.17.2: The top two selections made by the U.S. regarding how important certain internal factors were at impeding development of successful New Communities or contributing to their failure included inadequate leadership and financing. In the U.K., the top responses were uninspiring leadership, insufficient / episodic long-term funding, and inadequate / inflexible initial financing. Both countries clearly agreed that leadership is key.

5. Concluding Discussion

The survey results provide many insights into conceptions of the development of New Communities in the U.S. and U.K. among highly experienced professionals in the real estate and, to a lesser degree, policy and development related services. New Communities are defined by the survey respondents in both quantitative measures and qualitative attributes, providing an "ideal" prototype that can be further detailed, tested, and extended; and a broad, helpful outline of how respondents both in the U.S. and U.K. understand that New Communities can be assembled. First, they are residential communities with services and amenities geared to their residents, places where people and families can live (but not necessarily work) without having to leave the community for basic needs and recreational opportunities. Second, New Communities are embedded in the economic and transportation infrastructure of a greater region. In other words, they are not seen as standalone communities or envisioned as self-sufficient urban units. This clearly differentiates New Communities from other movements for new, standalone cities. In fleshing out details around this broad consensus, it is important to note that while some important differences between the U.K. and U.S. visions of New Communities exist, they are much closer overall than one might expect. While the U.K. respondents were open to larger populations, they tended to line up overall with the U.S. preference for medium to smaller communities. A mix of housing, beyond just the prototypical suburban image of single family housing, with attached, low-rise and midrise is key. However, it is notable that while multiple, denser types were preferred, few respondents in either country favored high-rise developments.

A mix of income for residents was expected, though New Communities in the U.S. are seen as skewing toward higher incomes than the U.K. Transit is key in both places and while the preference for it in the U.K. is stronger, the U.S. is not that far behind – something that might not have been the case even 10 years ago. Neighborhood serving retail and services, like grocery stores, convenience stores and modestly priced restaurants are key, but big box retail is of little interest. Likewise, parks, trails, community centers, childcare, primary and secondary schools are all key. Features like universities, continuing education and employment opportunities within the community (as opposed to access to regional employment opportunities) are not highly ranked. Surprisingly, respondents in both countries were uninterested in business real estate products and property types in New Communities. This all supports the idea of new communities as diverse residential places that support the activities of daily life and family, but are conceived as economically embedded in a larger regional framework.

On the development of successful New Communities it is very clear that the two key issues are visionary leaders and patient financing. Public private partnerships, which were unsurprisingly seen as key in the U.S., did not rank very highly in the U.K. This is interesting in that there appears to be a rapid increase in the use of this type of structure in the U.K. as well as many other places outside the U.S. Further investigation of this discrepancy would likely prove worthwhile.

The concepts of New Communities will inevitably continue to evolve, but this snapshot provides a timely look at how this important development type is understood today and envisioned for the future. While there has been a rich and long exchange of ideas and practices

around New Communities between the U.S. and U.K., the overall similarity between each country's responses is somewhat surprising given their unique historical developments, distinct government and business roles, and organizational patterns. While more historical-comparative analysis would be needed to confirm, there are indications that the U.S. conception of the physical form (land area, density, housing typologies) and use of transit (rail transit, rapid bus) are moving closer to what is commonly thought of as the U.K. tradition. And while it does not yet rank highly, the U.K. conception of the organizational structures of New Communities, historically more government-led, may be moving in the U.S. direction of public-private partnerships faster than is realized. Additional research like this RICS/ULI survey can help to identify whether these are ongoing trends in the innovations of New Communities that lead to a convergence of form and structure in the two countries.

Innovations in New Communities Interview Guide – US Version

This interview is one of approximately 30 I am conducting in 2014-2015 on innovations in urban planning, development and management. The interview responses provide important qualitative insights into the perspectives of experienced executives, professionals and thought-leaders who are, or have been, engaged in New Communities (NCs) in the US and / or UK. The interviews are recorded, with the interviewees' permission; the recordings are confidential. The screening questions concerning individuals, organizations and roles are used solely for my research purposes and are not individually attributable. The interviews are complemented by an electronic, web-based survey of members of the Counselors of Real Estate, the Royal Institution of Chartered Surveyors, the Royal Town Planning Institute, and / or The Urban Land Institute.

For the purposes of this interview, NCs are geographically-defined, primarily residential, mixed-use, mixed-income settlements for populations from 1,000 to 100,000, located in urban or suburban areas of the US and UK, that are master-planned, developed, and managed by one or more business or government organizations. US NCs generally are private ventures known as "master-planned communities" such as Columbia, Maryland. UK NCs are primarily public sector initiatives known as "garden cities" and "new towns" such as Milton Keynes. In both countries, NCs increasingly are developed through public-private partnerships, with both business and government stakeholders, such as Fort Belvoir, Virginia and King's Cross, London. The survey and interviews incorporate two major types of NCs for analysis and planning: "Greenfield" and "Urban Renaissance".

NCs are intended by their developers to achieve a range of social and economic objectives, from wider housing and job choices to resilient, sustainable living environments to more diversified local economies; and, recently, to communities with mass transit connections that reduce car dependence and energy usage. NCs typically include a range of housing types and employment opportunities; community and recreational facilities; retail and commercial services; schools, healthcare and other public services; and active as well as passive open space. Thus, NCs are a public policy instrument and business value proposition for managing urbanization.

*Sandy Apgar
November 2014*

Name:

Organization:

Current Role:

Date / Location of Interview: ____ / ____

1. Professional / Personal Background:

1.1 What was your first involvement with New Communities (NCs) – and when? What was your organizational affiliation at the time (if any)? What was your role?

1.2 What have been your major roles with NCs, and your related affiliations, since then?

1.3 Which professional and personal attributes most drive your interest in NCs?

2. Definitions:

2.1 How do you characterize NCs? *[Use one-two word descriptors that come to mind, such as "human scale," "environmentally friendly," "socially diverse," "economically-balanced" etc.]*

2.2 Which three NCs do you consider as "best in class" -- In the US? In the UK? Anywhere else? In a few words for each, what makes them "best"?

2.3 Which features differentiate NCs from conventional urban and suburban developments? *[Use categories that come to mind, such as community layout, building design, project organisation, financing, local government and community services, etc.]*

3. Objectives / Performance:

3.1 How would you describe the overall purposes and operational objectives of NCs?

3.2 Which criteria and performance measures do you use to assess NC successes – and failures?

3.3 How well have NCs achieved their original objectives against these criteria and measures? *[Categorize philosophical, physical, social, economic, financial, political, etc.]*

3.4 Which of the "best" NCs that you identified in Question 2.2 above have achieved quantifiable outcomes? Which features make these "best" – and why?

3.5 Why have NCs continued to attract the attention of planners and policymakers, despite their uneven (and, by some measures, weak) financial performance?

4. Enduring Policy Issues:

4.1 How could NCs capture the values they create on adjacent sites that they do not control?

4.2 How could NCs best meet "affordable / workforce housing" goals while attracting and supporting residents of market-rate housing?

4.3 How could long-term liabilities resulting from NC development be "matched" with the build-up of asset values and risks at each stage of the NC lifecycle?

4.4 How could urban and neighborhood designs for NCs provide more lively, "quirky" and "idiosyncratic" spaces to foster the creative aspects of NC life?

5. Innovativeness:

- 5.1 Which NCs are the most innovative – and why?
- 5.2 Which of the NCs' features that you listed under Question 2.3 do you regard as "innovative" – and why?
- 5.3 Which NC innovations are "*game-changing*" – i.e., they fundamentally changed established policies and practices of community planning, development and management?
- 5.4 Which NC innovations are "*incremental*" – i.e., they improved efficiencies and effectiveness in the development and management process but they did not represent fundamental changes?
- 5.5 Which NC innovations are "*generational*" – i.e., they attract and sustain specific demographic groups, such as "Millennials" and "Boomers"?
- 5.6 Which NC innovations are "*enduring*" – ie, they have lasted beyond their original applications and have been adopted by, or adapted to, other NCs?
- 5.7 How have NCs as a class, or specific individual NCs, changed the ways residential communities in general are now being planned and developed?
- 5.8 Which capabilities differentiate innovative NC enterprises from other development and management organizations?

6. Influencers / Methods:

- 6.1 Which individuals were most influential in, and important to, the NCs' success at each stage of planning, development, and operations? [*Categorize roles in original concept, launch and early implementation, mature organization and management, final exit or disposition, etc.*]
- 6.2 How did NC executives manage risk and cost in planning, development, and operations? [*Characterize Columbia, MD, Fort Belvoir's RCI; and others you know personally.*]
- 6.3 Which analytical tools and methods were most important to the NCs' successes – or failures? Which tools / methods have been adopted by, or adapted to, other NCs? Which of these represent "enduring" innovations? [*Categorize physical, social, economic, financial, political, etc.*]

7. Lessons:

- 7.1 Why have privately developed and financed NCs been more prevalent in the US than in the UK? Why did the US Government's Title VII NC program fail to achieve its original promise? What lessons have public policymakers learned from the private sector's experience in NCs?
- 7.2 What lessons do you draw from US and UK NCs – specifically in Columbia, MD, Milton Keynes, UK and / or other comparable projects? [*Categorize policies, performance, financial structures, management, community services, etc.*]

Innovations in New Communities Interview Guide – UK Version

This interview is one of approximately 30 I am conducting in 2014-2015 on innovations in urban planning, development and management. The interview responses provide important qualitative insights into the perspectives of experienced executives, professionals and thought-leaders who are, or have been, engaged in New Communities (NCs) in the UK and / or US. The interviews are recorded, with the interviewees' permission; the recordings are confidential. The screening questions concerning individuals, organisations and roles are used solely for my research purposes and are not individually attributable. The interviews are complemented by an electronic, web-based survey of members of the Counselors of Real Estate, the Royal Institution of Chartered Surveyors, the Royal Town Planning Institute, and / or The Urban Land Institute.

For the purposes of this interview, NCs are geographically-defined, primarily residential, mixed-use, mixed-income settlements for populations from 1,000 to 100,000, located in urban or suburban areas of the UK and US, that are master-planned, developed, and managed by one or more government or business organisations. UK NCs are primarily public sector initiatives known as "garden cities" and "new towns" such as Milton Keynes. US NCs generally are private ventures known as "master-planned communities" such as Columbia, Maryland. In both countries, NCs increasingly are developed through public-private partnerships, with both business and government stakeholders, such as Fort Belvoir, Virginia and King's Cross, London. The survey and interviews incorporate two major types of NCs for analysis and planning: "Greenfield" and "Urban Renaissance".

NCs are intended by their developers to achieve a range of social and economic objectives, from wider housing and job choices to resilient, sustainable living environments to more diversified local economies; and, recently, to communities with public transport connections that reduce car dependence and energy usage. NCs typically include a range of housing types and employment opportunities; community and recreational facilities; retail and commercial services; schools, healthcare and other public services; and active as well as passive open space. Thus, NCs are a public policy instrument and business value proposition for managing urbanisation.

*Sandy Apgar
November 2014*

Name:

Organisation:

Current Role:

Date / Location of Interview: ____ / ____

1. Professional / Personal Background:

1.1 What was your first involvement with New Communities (NCs) – and when? What was your organisational affiliation at the time (if any)? What was your role?

1.2 What have been your major roles with NCs, and your related affiliations, since then?

1.3 Which professional and personal attributes most drive your interest in NCs?

2. Definitions:

2.4 How do you characterise NCs? *[Use one-two word descriptors that come to mind, such as "human scale," "environmentally friendly," "socially diverse," "economically-balanced" etc.]*

2.5 Which three NCs do you consider as "best in class" -- In the UK? In the US? Anywhere else? In a few words for each, what makes them "best"?

2.6 Which features differentiate NCs from conventional urban and suburban developments? *[Use categories that come to mind, such as community layout, building design, project organisation, financing, local government and community services, etc.]*

3. Objectives / Performance:

3.1 How would you describe the overall purposes and operational objectives of NCs?

3.2 Which criteria and performance measures do you use to assess NC successes – and failures?

3.3 How well have NCs achieved their original objectives against these criteria and measures? *[Categorise philosophical, physical, social, economic, financial, political, etc.]*

3.4 Which of the "best" NCs that you identified in Question 2.2 above have achieved quantifiable outcomes? Which features make these "best" – and why?

3.5 Why have NCs continued to attract the attention of planners and policymakers, despite their uneven (and, by some measures, weak) financial performance?

4. Enduring Policy Issues:

4.1 How could NCs capture the values they create on adjacent sites that they do not control?

4.2 How could NCs best meet "affordable" housing goals while attracting and supporting residents of market-rate housing?

4.3 How could long-term liabilities resulting from NC development be "matched" with the build-up of asset values and risks at each stage of the NC lifecycle?

4.4 How could urban and neighbourhood designs for NCs provide more lively, "quirky" and "idiosyncratic" spaces to foster the creative aspects of NC life?

5. Innovativeness:

- 5.1 Which NCs are the most innovative – and why?
- 5.2 Which of the NCs' features that you listed under Question 2.3 do you regard as "innovative" – and why?
- 5.3 Which NC innovations are "*game-changing*" – i.e., they fundamentally changed established policies and practices of community planning, development and management?
- 5.4 Which NC innovations are "*incremental*" – i.e., they improved efficiencies and effectiveness in the development and management process but they did not represent fundamental changes?
- 5.5 Which NC innovations are "*generational*" – i.e., they attract and sustain specific demographic groups, such as "Millennials" and "Boomers"?
- 5.6 Which NC innovations are "*enduring*" – i.e., they have lasted beyond their original applications and have been adopted by, or adapted to, other NCs?
- 5.7 How have NCs as a class, or specific individual NCs, changed the ways residential communities in general are now being planned and developed?
- 5.8 Which capabilities differentiate innovative NC enterprises from other development and management organisations?

6. Influencers / Methods:

- 6.1 Which individuals were most influential in, and important to, the NCs' success at each stage of planning, development, and operations? [*Categorise roles in original concept, launch and early implementation, mature organisation and management, final exit or disposition, etc.*]
- 6.2 How did NC executives manage risk and cost in planning, development, and operations? [*Characterise individual New Towns, Garden Cities, Urban Regeneration and similar NC projects that you know personally.*]
- 6.3 Which analytical tools and methods were most important to the NCs' successes – or failures? Which tools / methods have been adopted by, or adapted to, other NCs? Which of these represent "enduring" innovations? [*Categorise physical, social, economic, financial, political, etc.*]

7. Lessons:

- 7.1 Why have privately developed and financed NCs been more prevalent in the US than in the UK? Which privately developed UK projects best demonstrate NC principles and innovations? What lessons have public policymakers learned from the private sector's experience in NCs?
- 7.2 What lessons do you draw from the UK New Towns – specifically Milton Keynes and other government-sponsored projects?
- 7.3 What lessons do you draw from UK NCs developed through public-private partnerships – specifically King's Cross, London; Millennium Village, Greenwich; Salford Quays, Manchester; and / or other comparable UK projects? [*Categorise policies, performance, financial structures, management, community services, etc.*]